Employer Self Service User Guide

DUA QUEST Project

Division of Unemployment Assistance (DUA)

Commonwealth of Massachusetts

TABLE OF CONTENTS – QUEST EMPLOYER USER GUIDE

QUEST System Overview

SYSTEM OVERVIEW

Introduction to QUEST	QUEST (Quality Unemployment System Transformation) will be the completely re-engineered Revenue and Benefits system, providing Employers, Third Party Administrators and claimants with a fast, interactive web-enabled way to transact business with DUA. The scope of QUEST includes the two major systems namely, Revenue and Benefits. While the features of the Revenue system will be available from December 7, 2009 for the use of Employers and Third Party Administrators, the Benefits system is expected to go live in 2011. The scope of this user guide is limited to the Revenue System and is intended for use by Employers accessing QUEST. If you are a Third Party Administrator (TPA) looking for information specific to your role as a TPA, please refer to the self service user guide for Third Party Administrators.
REVENUE System	The DUA QUEST Revenue System will automate the Registration, Wage and Employment Reporting, Tax Calculation and Payment processes and facilitate these time-saving improvements for employers: • Employers will be able to get complete up-to-date account information and access and maintain their accounts online, via self service. • Wage and Employment filings, UI and UHI Tax filings can be completed in a single process. • Large Employers and/or Third Party Agents will be able to file electronically and process multiple records at the same time. • Smaller Employers will be able to use online processing for quarterly tax filing and upload documents using specified formats. • Employers and Third Party Administrators will be able to make secure online payments.
Disclaimer:	The purpose of this user guide is to help Employers to navigate the QUEST system. It should not be used as a reference for Unemployment Insurance Program policies and procedures. Please refer to the DUA website at www.mass.gov/dua for Unemployment Insurance Program Policies and Procedures.

LOGGING IN AND NAVIGATION

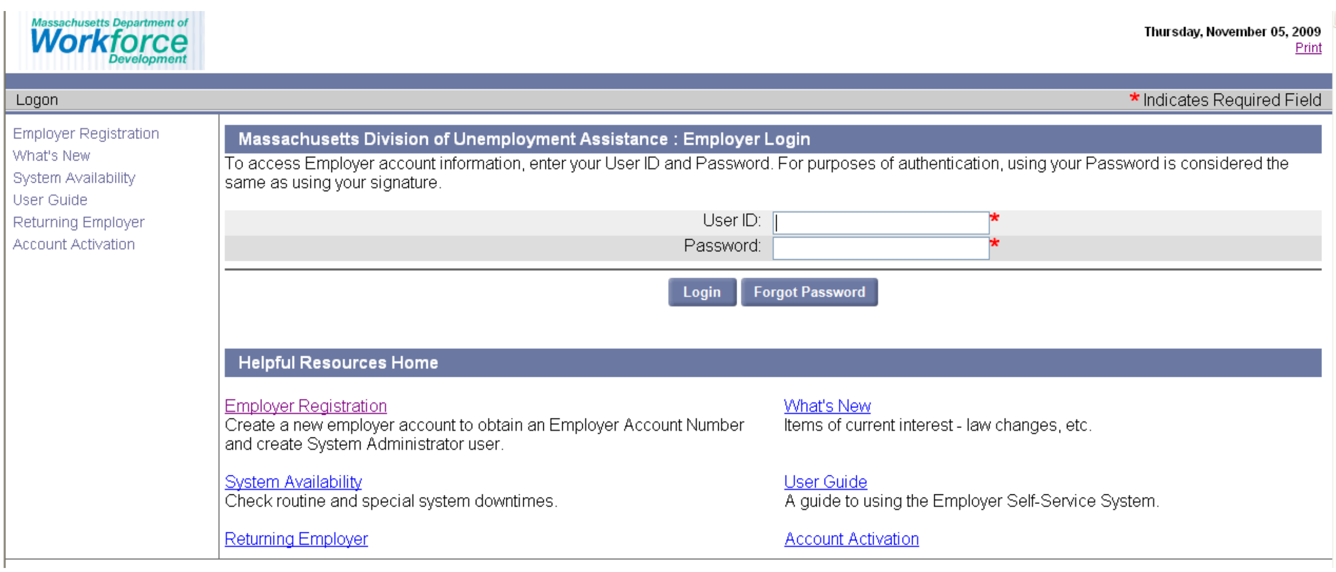
Introduction	This section of the user guide will show how an authorized user will be able to log in to the QUEST system and navigate around QUEST. In order to be able to login to QUEST using the instructions here, you must have completed the 'Employer Registration' or 'Account Activation' process.

Step-by-Step Instructions:

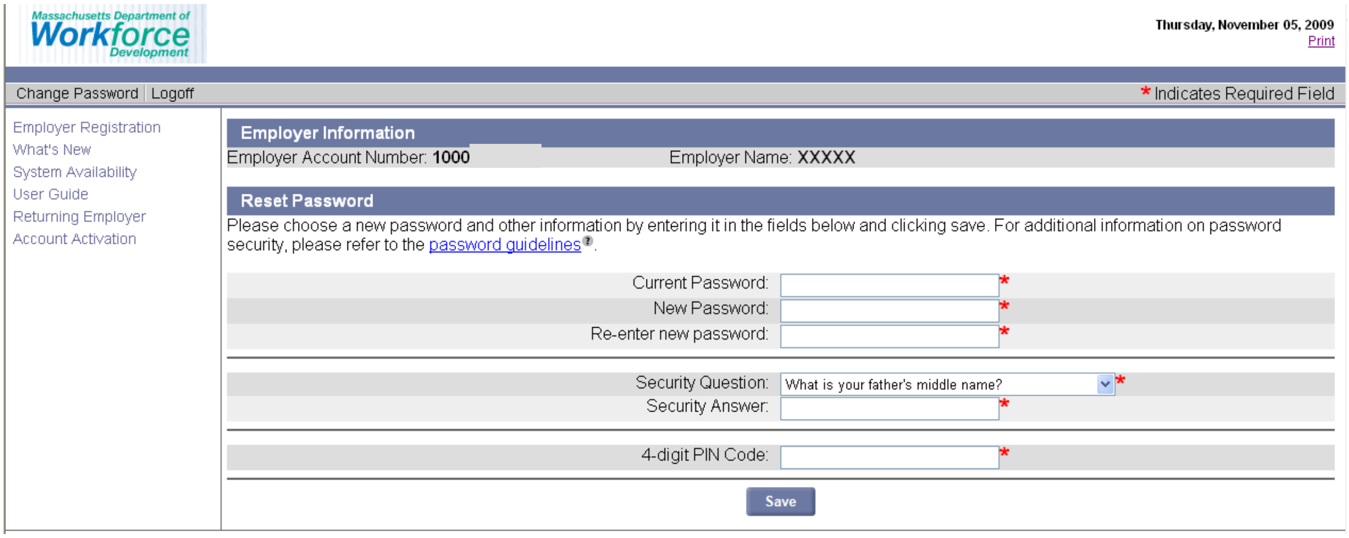
FIRST TIME LOGIN:

The step by step instructions below should be used if you are logging in for the first time after completing the initial registration or account activation. Please refer to the set of instructions - 'LOGGING IN', for a normal login process.

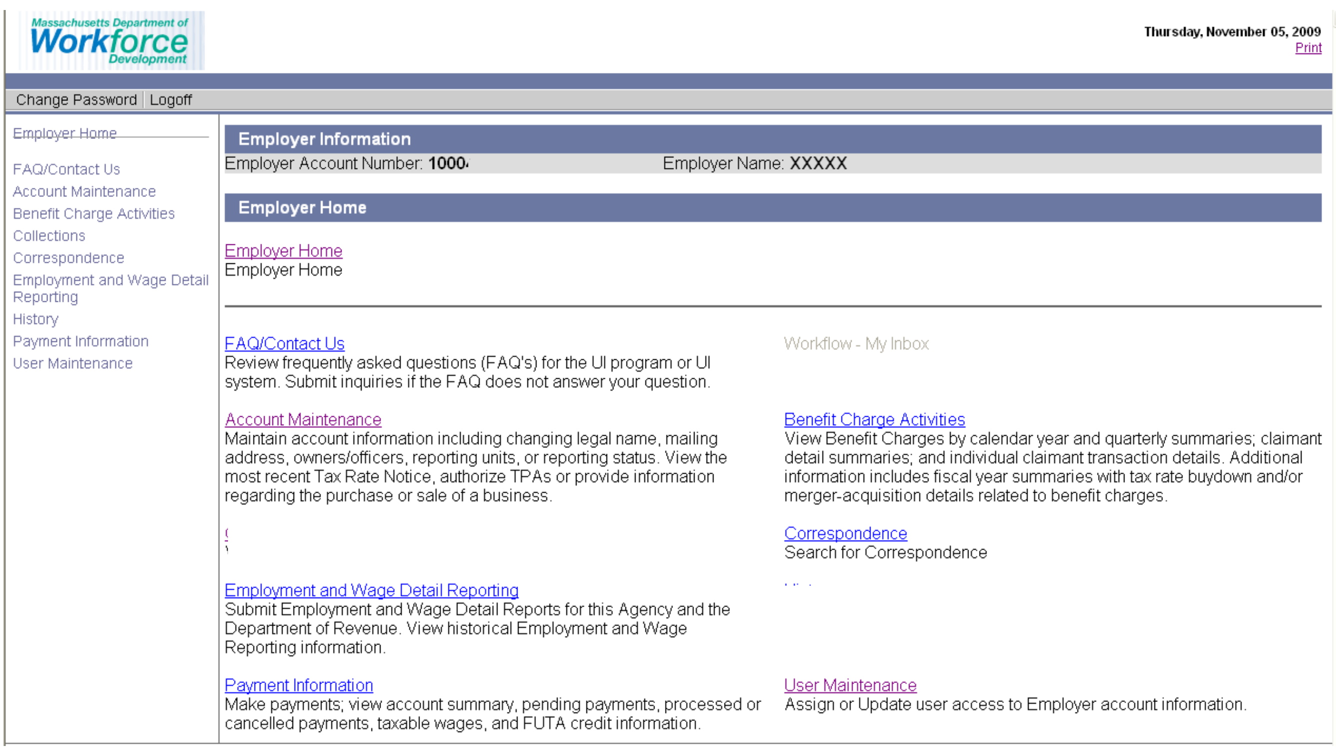
1. Go to the DUA – QUEST webpage at www.mass.gov/uima.
2. Click on the link 'Employer Login'.
3. The following page will appear. Enter the user ID and password you received by U.S. mail after successful completion of the registration process or account activation. Click 'Login'.



4. The following page will appear. Enter the requested information to reset your initial password received by U.S. mail. Click 'Save' to continue.



5. The employer home page will appear as shown below.

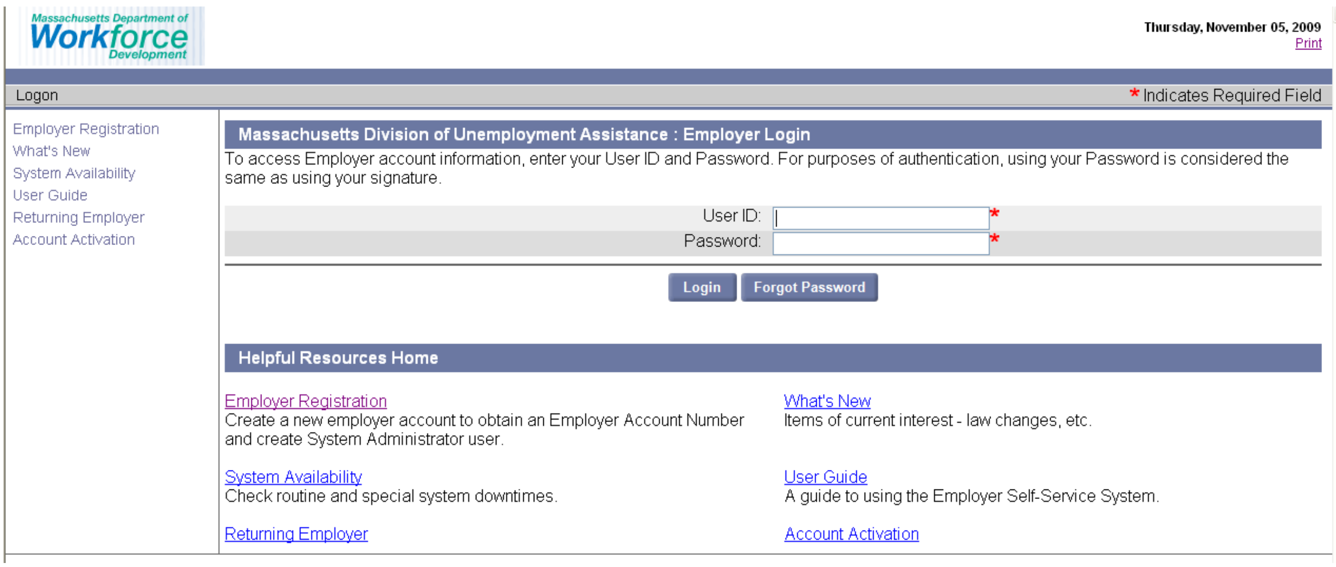


6. The login process is complete.

LOGGING IN:

1. Go to the DUA – QUEST webpage at www.mass.gov/uima . Click on the link ' Employer Login'.
2. The following page will appear. Enter the user ID and password provided to you by your system administrator. Click 'Login'.

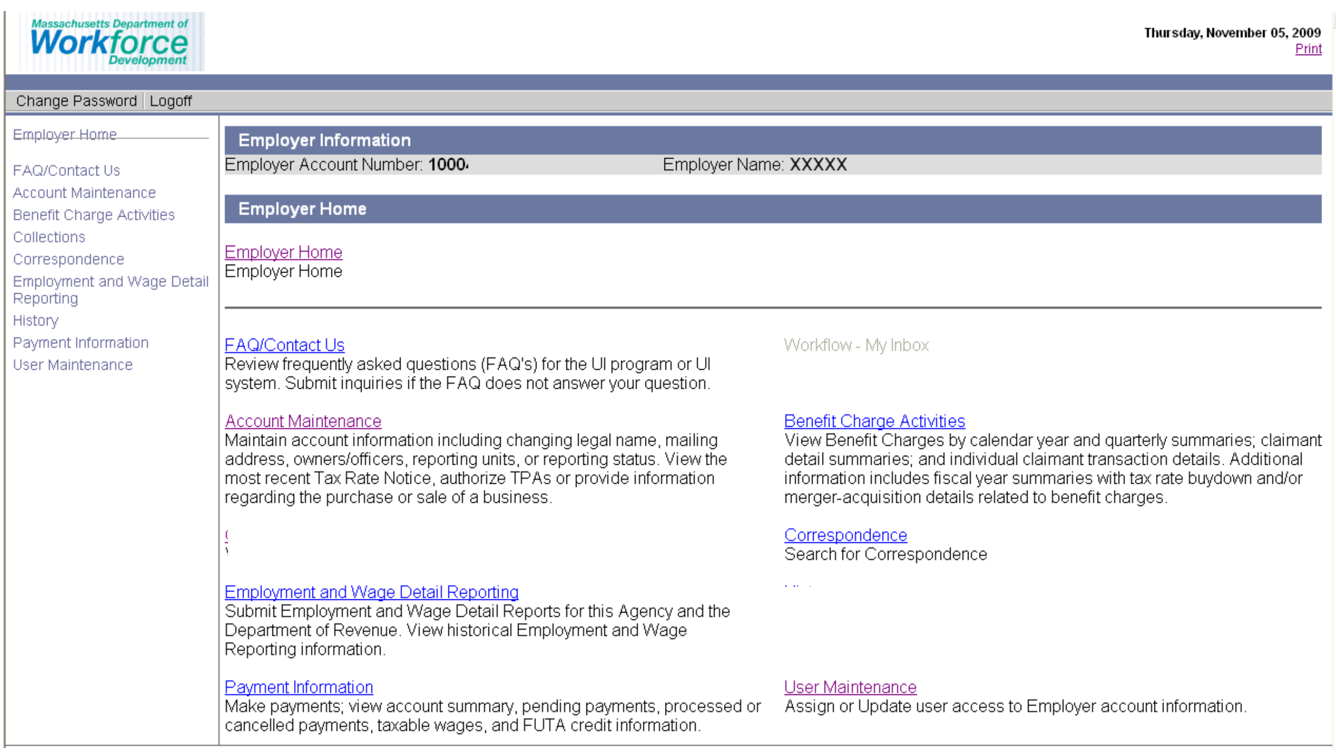
NOTE: If you do not have a user ID and password, contact your system administrator. If you have forgotten your password, contact your system administrator and he/she will be able to reset your password.


Massachusetts Department of Workforce Development
Thursday, November 05, 2009
Print
Logon
* Indicates Required Field
Employer Registration
What's New
System Availability
User Guide
Returning Employer
Account Activation

Massachusetts Division of Unemployment Assistance : Employer Login
To access Employer account information, enter your User ID and Password. For purposes of authentication, using your Password is considered the same as using your signature.
User ID: *
Password: *
Login | Forgot Password

Helpful Resources Home
Employer Registration
Create a new employer account to obtain an Employer Account Number and create System Administrator user.
What's New
Items of current interest - law changes, etc.
System Availability
Check routine and special system downtimes.
User Guide
A guide to using the Employer Self-Service System.
Returning Employer
Account Activation

3. The home page will appear as below.


Massachusetts Department of Workforce Development
Thursday, November 05, 2009
Print
Change Password | Logoff
Employer Home
FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information
Employer Account Number: **1000** Employer Name: **XXXXX**

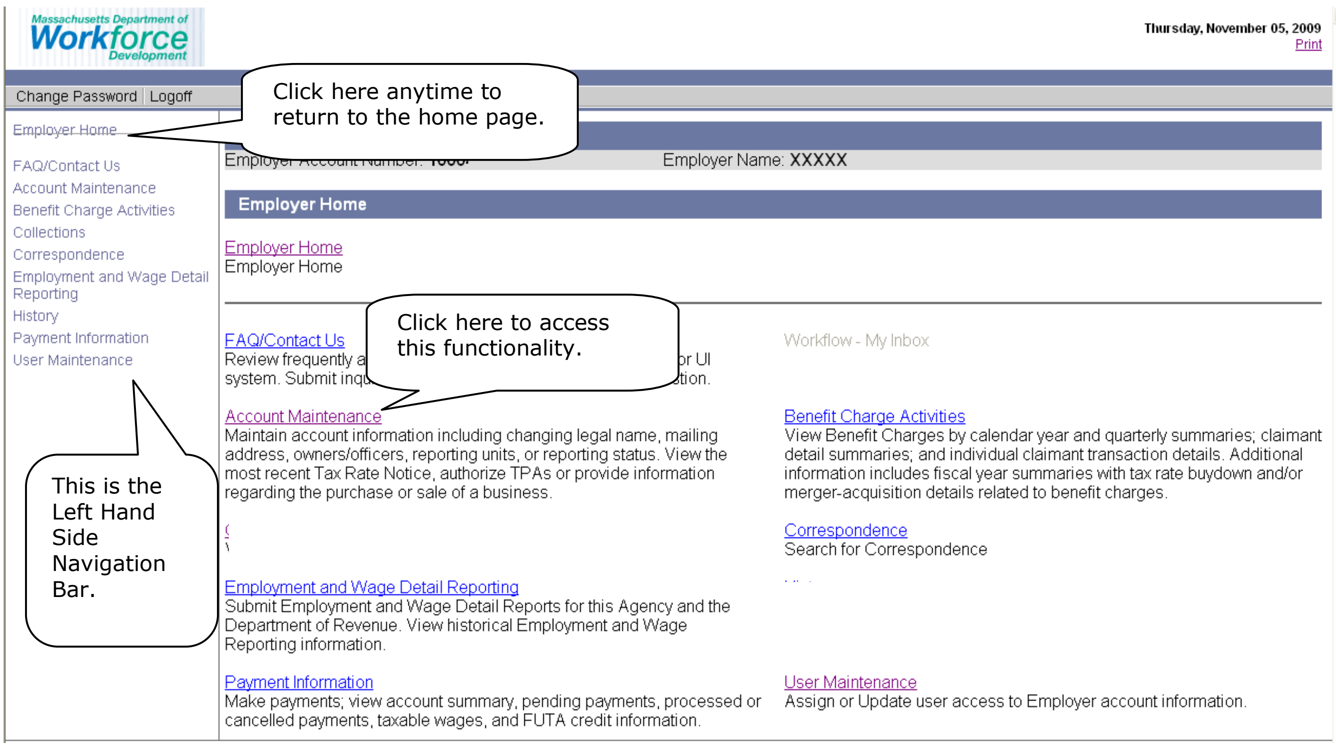
Employer Home
Employer Home
Employer Home

FAQ/Contact Us
Review frequently asked questions (FAQ's) for the UI program or UI system. Submit inquiries if the FAQ does not answer your question.
Workflow - My Inbox
Account Maintenance
Maintain account information including changing legal name, mailing address, owners/officers, reporting units, or reporting status. View the most recent Tax Rate Notice, authorize TPAs or provide information regarding the purchase or sale of a business.
Benefit Charge Activities
View Benefit Charges by calendar year and quarterly summaries; claimant detail summaries; and individual claimant transaction details. Additional information includes fiscal year summaries with tax rate buydown and/or merger-acquisition details related to benefit charges.
Correspondence
Search for Correspondence
Employment and Wage Detail Reporting
Submit Employment and Wage Detail Reports for this Agency and the Department of Revenue. View historical Employment and Wage Reporting information.
Payment Information
Make payments; view account summary, pending payments, processed or cancelled payments, taxable wages, and FUTA credit information.
User Maintenance
Assign or Update user access to Employer account information.

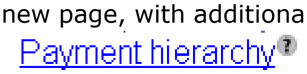
NAVIGATION:

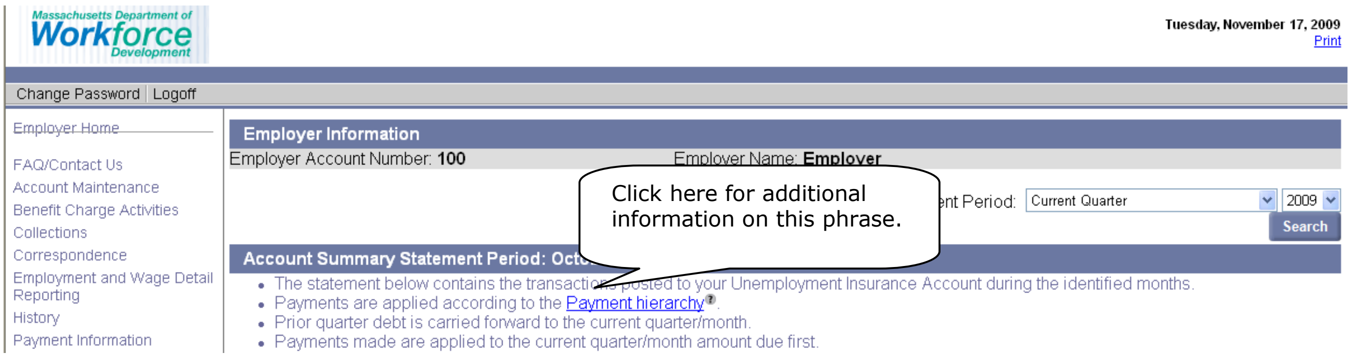
The following is a list of navigation tips:

1. The first page that appears after the user logs in to the system is known as the home page (screenshot below). The user can access the various functions available to him/her by clicking on the respective links. For example, if the user needs to access the Account Maintenance functions, the user will click on 'Account Maintenance' and so on. On this home page, the user will see only the functions limited to his/her security role, as enabled by the system administrator.



2. **Left Hand Side Navigation bar**: The first page that appears after the user logs in to the system is known as the home page. The left hand side navigation bar is displayed throughout the time you are logged into QUEST. This bar always lists the options available to you in the staff splash page and a drill down list of options available under the current function.

3. **Helpful hints**: Throughout the QUEST system web pages, you will find clickable links followed by a question mark. Clicking on the link will open up a new page, with additional information/definition of the phrase. For example: 



The definition of the phrase will appear in a separate window as shown below.

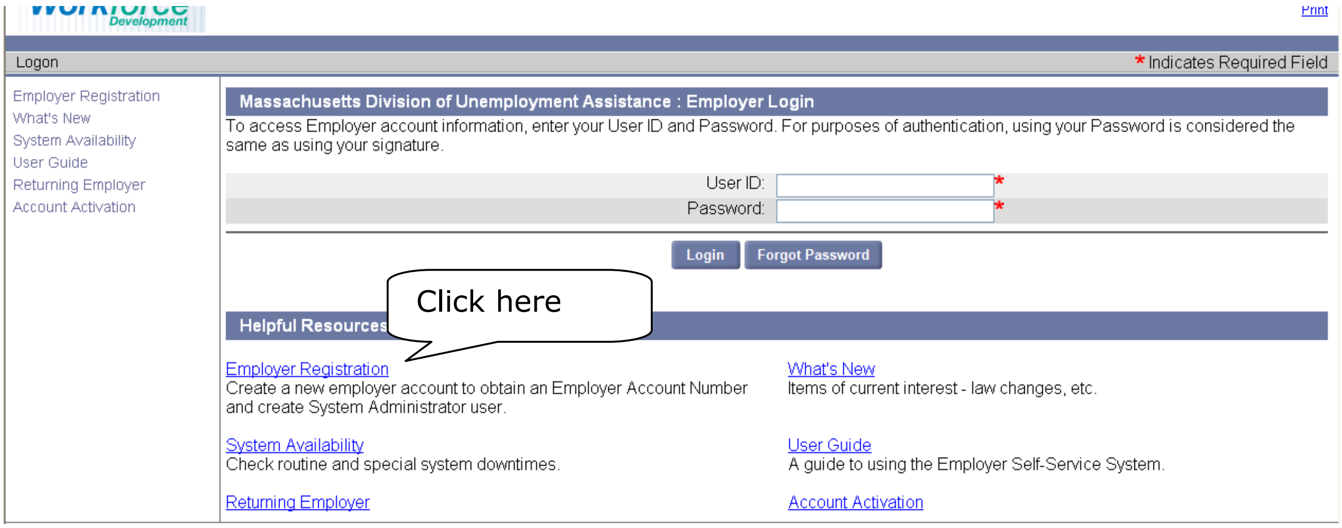
4. **Change Password/Log off**: The links to change password/log off are displayed throughout the time you are logged onto QUEST. Click on these links any time to change your password or log off the system.

Employer Account Registration

Introduction	Employers who pay wages to anyone working or living within Massachusetts are required to register with and report quarterly wage data to the Department of Unemployment Assistance (DUA). This registration process will determine if the Employer will be subject to Unemployment Insurance (UI) Contributions, and after successful registration it will provide access to the system through which Quarterly Wage records are reported. This section of the document will guide the user through creating a new employer account and completing registration. If you have an existing account with DUA and have received a correspondence about activating your account on the QUEST system, please refer to the 'Account Activation' section of this user guide for instructions. The instructions in this section are only for employers registering for the first time with DUA. IMPORTANT: The person completing the registration process for the UI employer account will be the System Administrator by default and will have access to all information in the employer's account. This means the system administrator will be able to view information, make changes, complete transactions, and give online access to other users in this account. Therefore, the person chosen by the employer to register the account should be a highly trusted employee.
Helpful Hints	The following information will be required in order to complete the registration process: • Type of legal entity (sole proprietor, partnership, LLC, etc.) • Doing business as name (DBA) • Federal Employer Identification Number (FEIN) • State and date of formation or incorporation • Date that employees first performed services in Massachusetts • Owner/Officer information: SSN, FEIN, percent of ownership • Principal Business Activity performed in Massachusetts • Quarterly Gross Summary of wages paid to date • Number of employees currently on the payroll

Step-by-Step Instructions:

1. Go to the following web page to begin registration – *www.mass.gov/uima.*
2. Click on the link 'Employer Login'.
3. The following page will appear. Click on the link 'Employer Registration'.



Print

Logon | * Indicates Required Field

Employer Registration
What's New
System Availability
User Guide
Returning Employer
Account Activation

Massachusetts Division of Unemployment Assistance : Employer Login

To access Employer account information, enter your User ID and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *
Password: *

Login | Forgot Password

Click here

Helpful Resources

Employer Registration
Create a new employer account to obtain an Employer Account Number and create System Administrator user.

What's New
Items of current interest - law changes, etc.

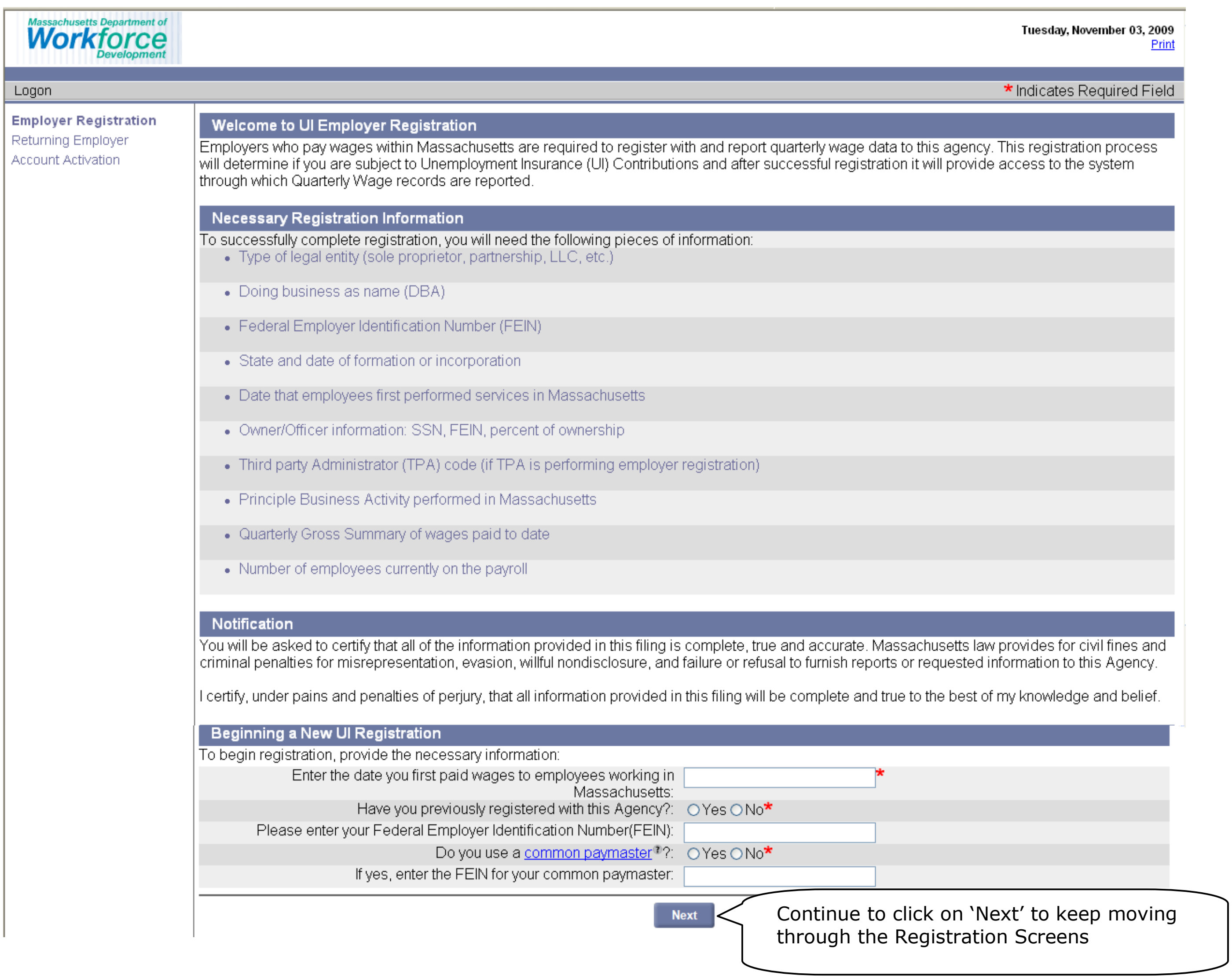
System Availability
Check routine and special system downtimes.

User Guide
A guide to using the Employer Self-Service System.

Returning Employer

Account Activation

4. The following page will appear. Begin entering the information requested on this screen and click 'Next'. The subsequent series of screens will take you through the registration process by having you answer questions and provide information.



Massachusetts Department of Workforce Development

Tuesday, November 03, 2009
Print

Logon | * Indicates Required Field

Employer Registration
Returning Employer
Account Activation

Welcome to UI Employer Registration

Employers who pay wages within Massachusetts are required to register with and report quarterly wage data to this agency. This registration process will determine if you are subject to Unemployment Insurance (UI) Contributions and after successful registration it will provide access to the system through which Quarterly Wage records are reported.

Necessary Registration Information

To successfully complete registration, you will need the following pieces of information:

- Type of legal entity (sole proprietor, partnership, LLC, etc.)
- Doing business as name (DBA)
- Federal Employer Identification Number (FEIN)
- State and date of formation or incorporation
- Date that employees first performed services in Massachusetts
- Owner/Officer information: SSN, FEIN, percent of ownership
- Third party Administrator (TPA) code (if TPA is performing employer registration)
- Principle Business Activity performed in Massachusetts
- Quarterly Gross Summary of wages paid to date
- Number of employees currently on the payroll

Notification

You will be asked to certify that all of the information provided in this filing is complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this Agency.

I certify, under pains and penalties of perjury, that all information provided in this filing will be complete and true to the best of my knowledge and belief.

Beginning a New UI Registration

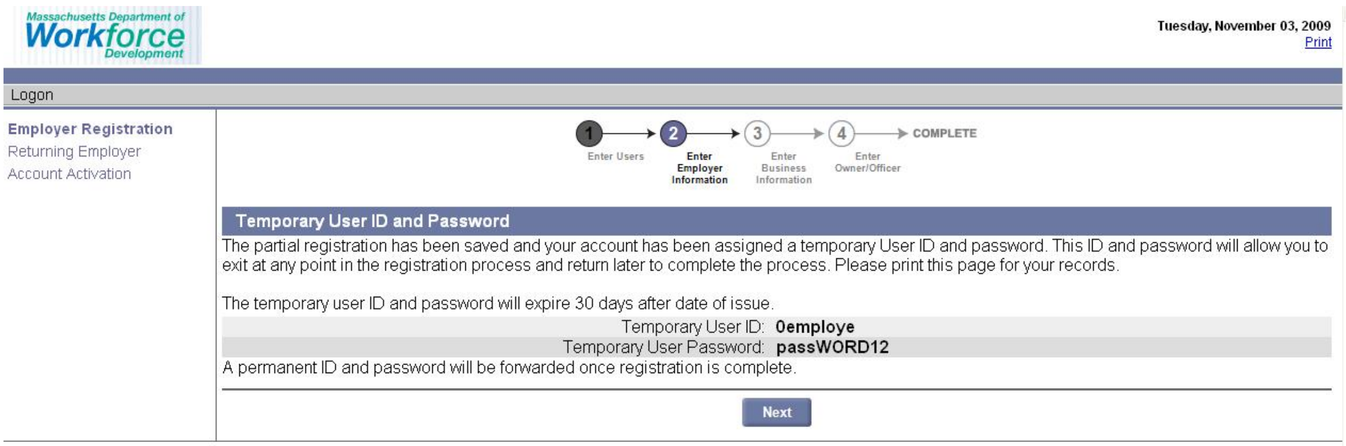
To begin registration, provide the necessary information:

Enter the date you first paid wages to employees working in Massachusetts: *
Have you previously registered with this Agency?: Yes No *
Please enter your Federal Employer Identification Number(FEIN):
Do you use a common paymaster?: Yes No *
If yes, enter the FEIN for your common paymaster:

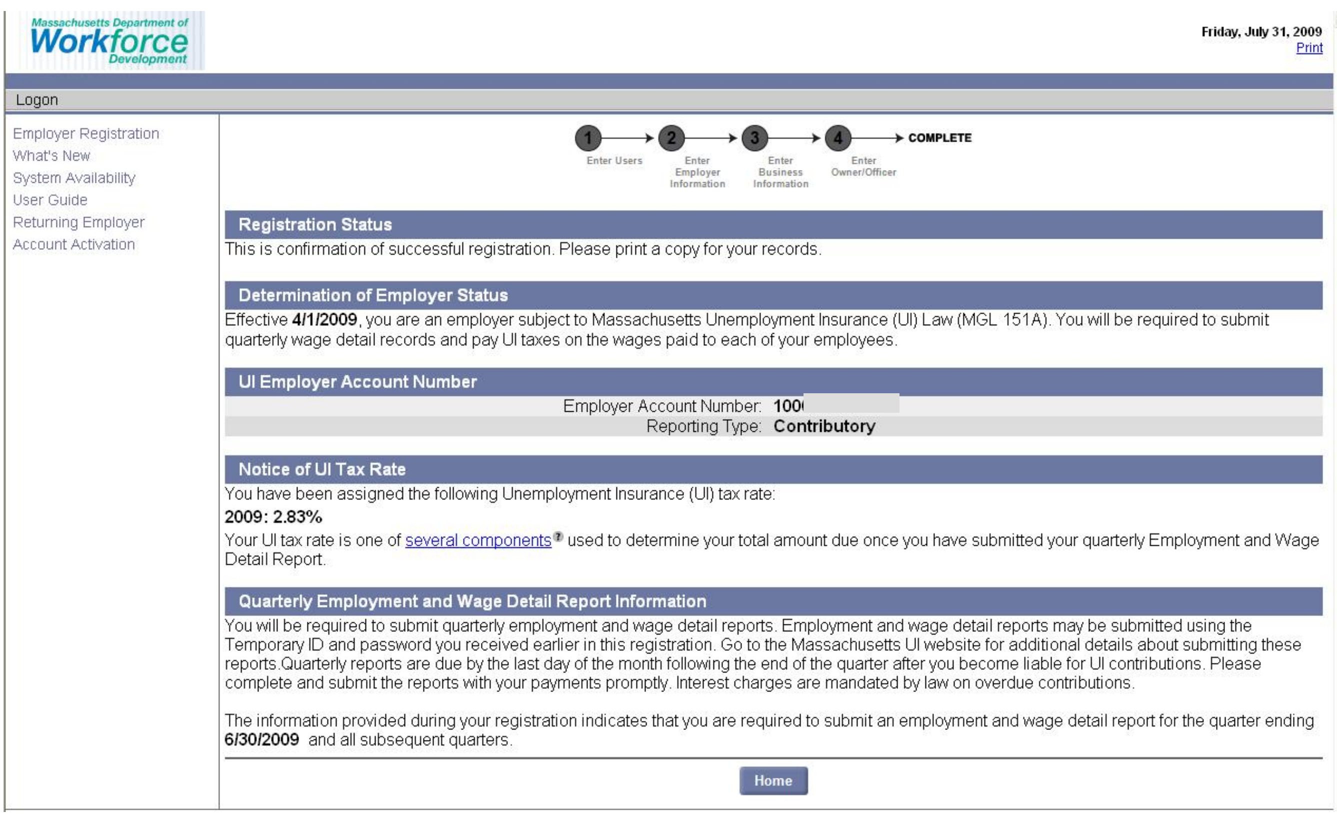
Next

Continue to click on 'Next' to keep moving through the Registration Screens

5. Once you get to the point where you have entered the user and employer information, the system will save the registration details entered so far and generate a temporary user ID and password. The screen below will show the level you must reach in the registration process for the employer information to be saved. If you quit the registration at this point or beyond, you can come back and continue the registration within a period of 30 days using the temporary user ID and password. Please refer to the section on 'Returning Employer' for instructions on returning later to complete the registration.



6. Continue to provide information through the remaining screens. The registration process will be complete when you have successfully entered all the user, employer, business and owner/officer Information. The successful completion of registration will look like the screenshot below.



8. You will receive a correspondence by U.S. mail with instructions to login to your account (as shown below). Please refer to the 'Logging In' section of this user guide for step by step instructions to login to the employer account.

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF UNEMPLOYMENT ASSISTANCE

DEVAL L. PATRICK
GOVERNOR

TIMOTHY P. MURRAY
LT. GOVERNOR

SUZANNE M. BUMP
SECRETARY

MICHAEL TAYLOR
DIRECTOR

EDWARD T. MALMBORG
DIRECTOR

2126760

Employer
19 STANIFORD ST
BOSTON, MA 02114-2502

November 06, 2009

EAN: xxxxxxxxx

Thank you for registering your business with Massachusetts Division of Unemployment Assistance. Based on the registration on 7/31/2009, Employer has been assigned the following logon credentials. Your permanent QUEST User ID and temporary Password are as follows:

Permanent User ID: xxxxxxxxx

Temporary Password: xxxxxxxxx

Please log on to the QUEST system at with these credentials in order to update your account.

If you feel this information has been assigned in error, please contact this agency at

Upon successful completion of registration:

Output 1	The employer will be assigned a Massachusetts Employer Account Number (MA EAN).
Output 2	UI Liability Status of Employer will be determined and all applicable rates will be assigned.

During Registration:

If	Then
Employer indicates a transfer of experience	The registration process will be diverted to process – Provide Information on the sale or purchase of a business, where the employer can provide historical information that will be used for Rate Calculation.
Employer is identified as Governmental or Non-Profit	Employer is assigned contributory status. Employer's payment method will be changed to reimbursable if proof of 501(c)(3) status is received within 30 days.

Account Activation

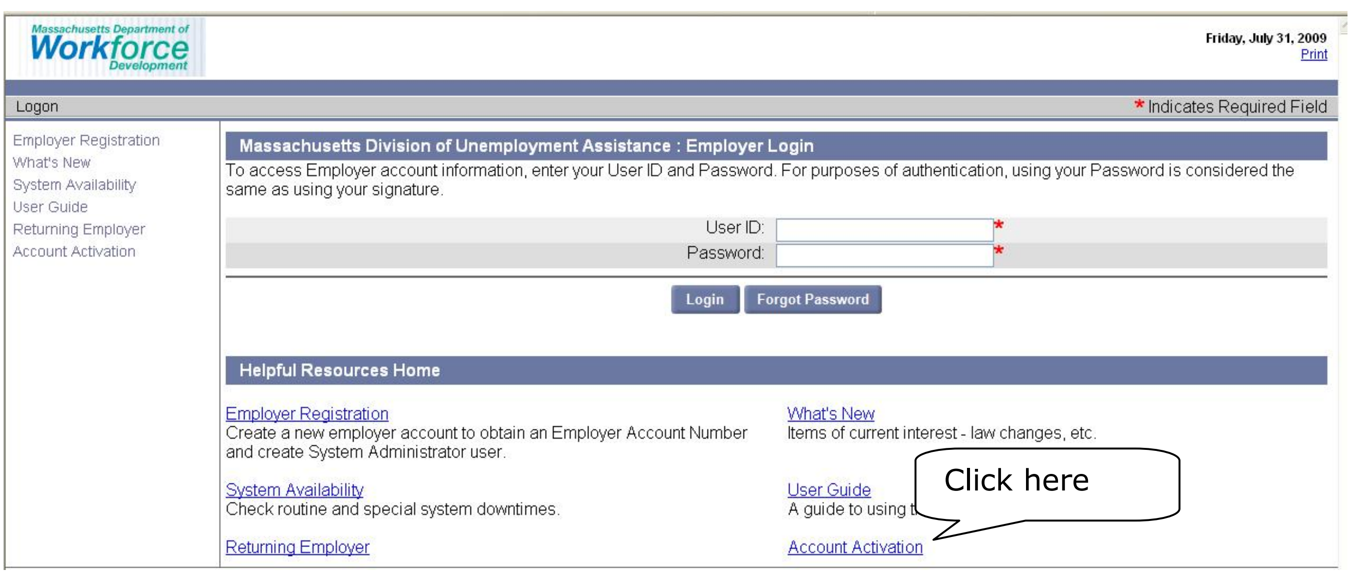
Introduction

This section of the document will show how an authorized user can activate an existing employer account with DUA. The set of instructions here are applicable to employers registered with DUA before December 7, 2009 and have received a correspondence via U.S. mail about activating their account in the QUEST system. The instructions here will not be applicable if you are a new employer registering with DUA for the first time.

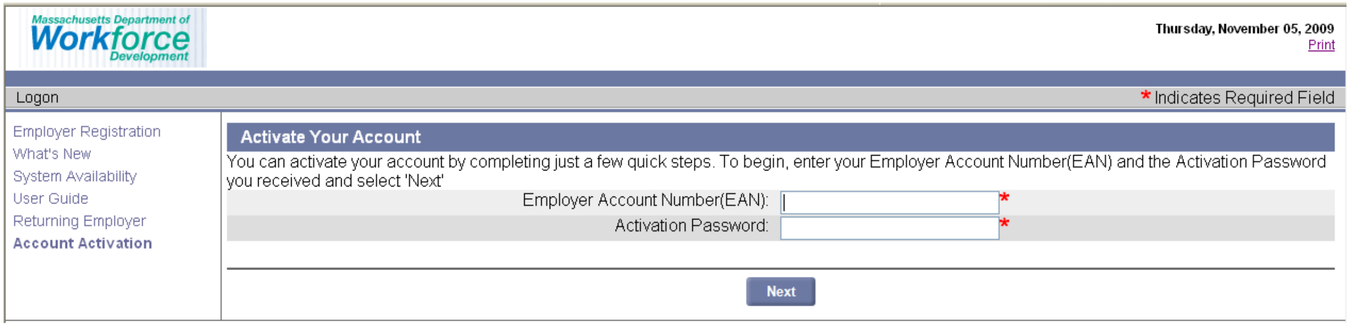
IMPORTANT: The person completing the account activation for the UI employer account will be the System Administrator by default and will have access to all information in the employer's account. This means the system administrator will be able to view information, make changes, complete transactions, and give online access to other users in this account. Therefore, the person chosen by the employer to activate the account should be a highly trusted employee

Step-by-Step Instructions:

1. Go to the following web page to begin account activation – *www.mass.gov/uima*
2. Click on the link 'Employer Login'.
3. . The following page will appear. Click on the link 'Account Activation'.



4. The following page will appear. Enter your employer account number and the password received in the mail. Click 'Next' to continue.



Massachusetts Department of Workforce Development

Thursday, November 05, 2009
Print

Logon
* Indicates Required Field

Employer Registration
What's New
System Availability
User Guide
Returning Employer
Account Activation

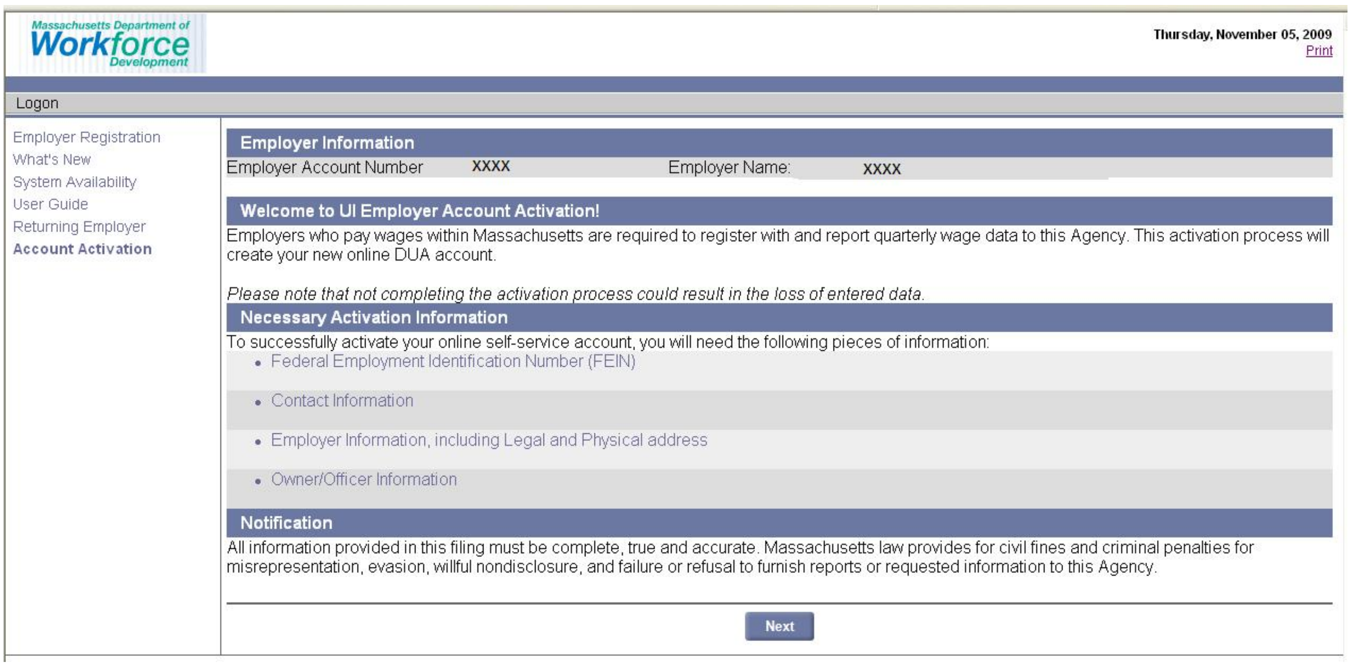
Activate Your Account

You can activate your account by completing just a few quick steps. To begin, enter your Employer Account Number(EAN) and the Activation Password you received and select 'Next'

Employer Account Number(EAN): *
Activation Password: *

Next

5. The following page will appear. Read the information displayed and click 'Next' to continue.



Massachusetts Department of Workforce Development

Thursday, November 05, 2009
Print

Logon

Employer Registration
What's New
System Availability
User Guide
Returning Employer
Account Activation

Employer Information

Employer Account Number XXXX Employer Name: XXXX

Welcome to UI Employer Account Activation!

Employers who pay wages within Massachusetts are required to register with and report quarterly wage data to this Agency. This activation process will create your new online DUA account.

Please note that not completing the activation process could result in the loss of entered data.

Necessary Activation Information

To successfully activate your online self-service account, you will need the following pieces of information:

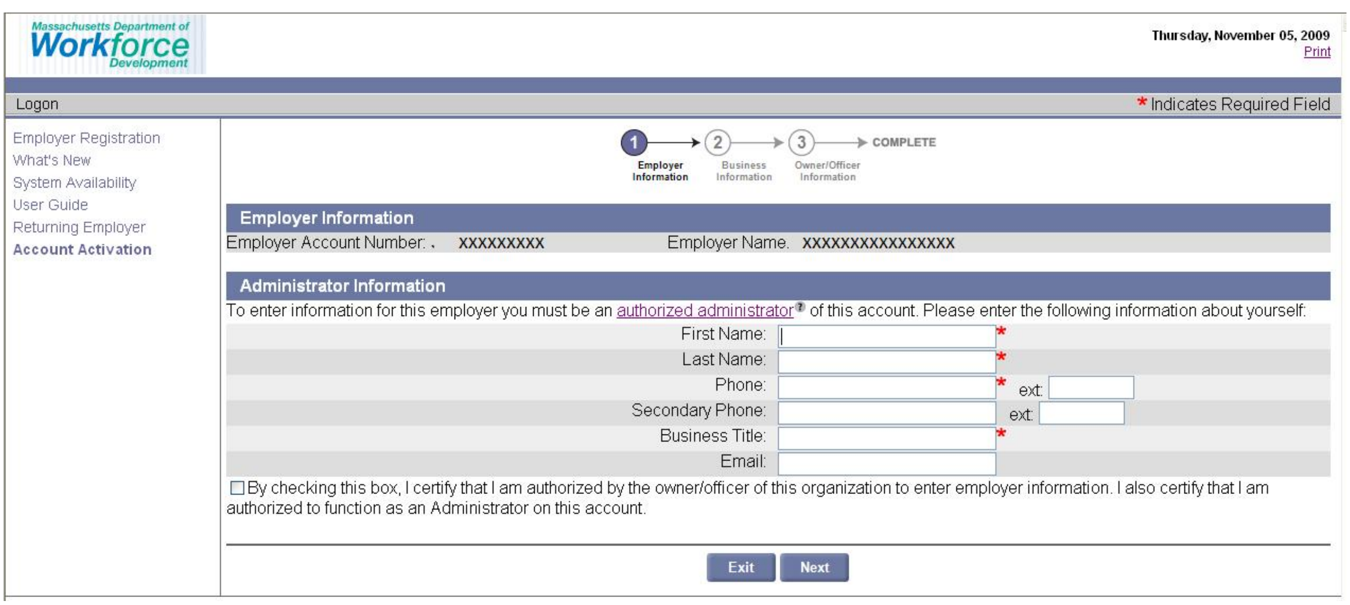
- Federal Employment Identification Number (FEIN)
- Contact Information
- Employer Information, including Legal and Physical address
- Owner/Officer Information

Notification

All information provided in this filing must be complete, true and accurate. Massachusetts law provides for civil fines and criminal penalties for misrepresentation, evasion, willful nondisclosure, and failure or refusal to furnish reports or requested information to this Agency.

Next

6. The following page will appear. You will be requested to enter the administrator information. Complete this section and click 'Next' to continue.



Massachusetts Department of Workforce Development

Thursday, November 05, 2009
Print

Logon
* Indicates Required Field

Employer Registration
What's New
System Availability
User Guide
Returning Employer
Account Activation

1 Employer Information → 2 Business Information → 3 Owner/Officer Information → COMPLETE

Employer Information

Employer Account Number: XXXXXXXXX Employer Name: XXXXXXXXXXXXXXXX

Administrator Information

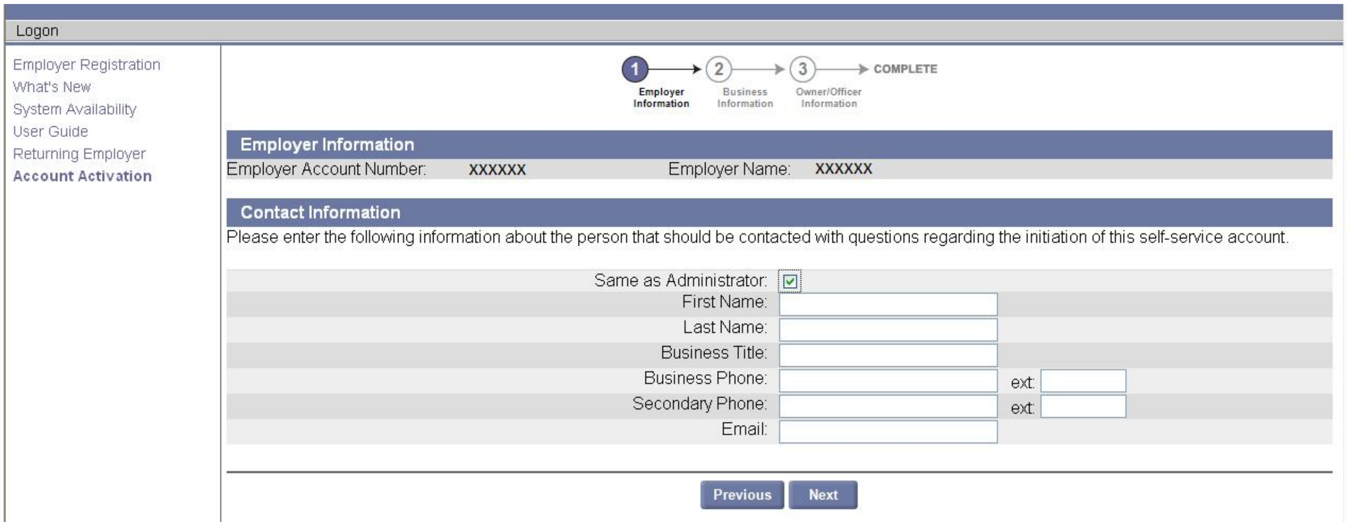
To enter information for this employer you must be an authorized administrator of this account. Please enter the following information about yourself:

First Name: *
Last Name: *
Phone: * ext:
Secondary Phone: ext:
Business Title: *
Email:

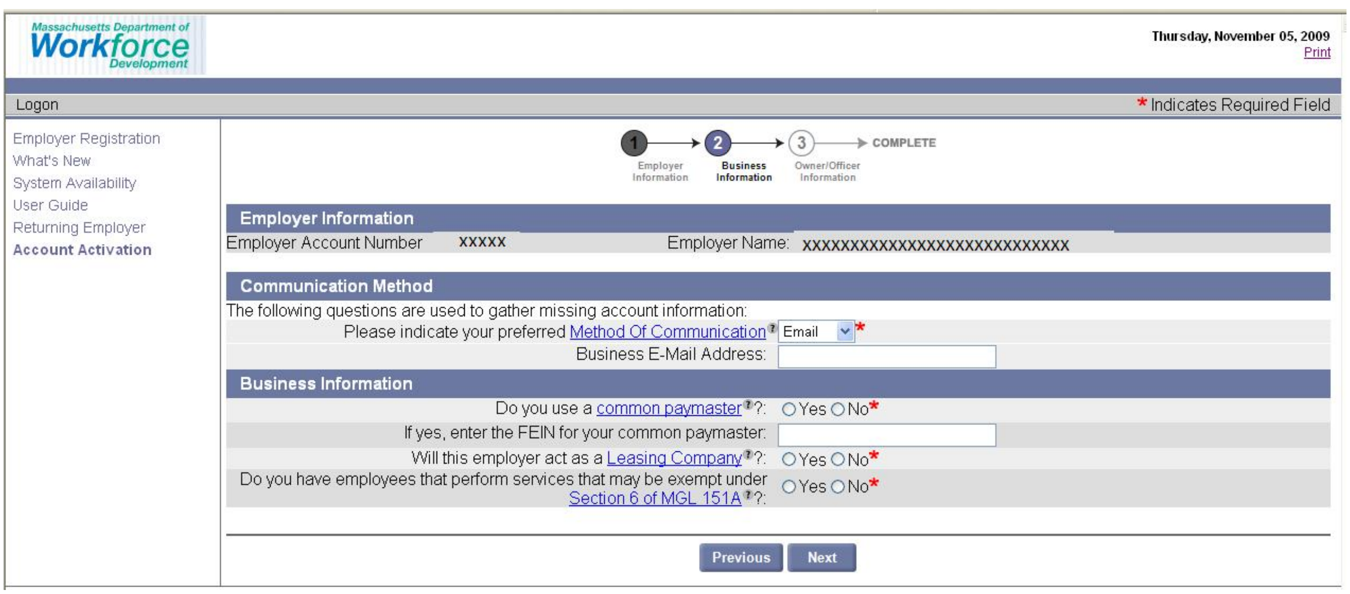
☐ By checking this box, I certify that I am authorized by the owner/officer of this organization to enter employer information. I also certify that I am authorized to function as an Administrator on this account.

Exit Next

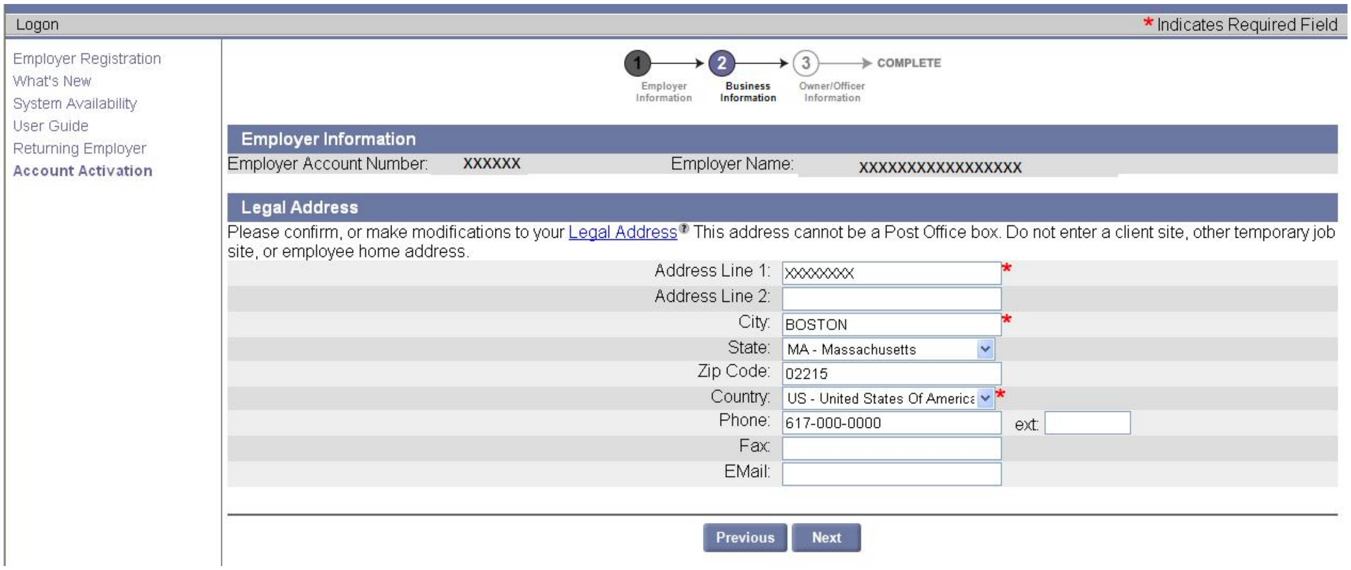
7. The following page will appear where you will be asked to enter the contact information. Complete the information and click 'Next' to continue.



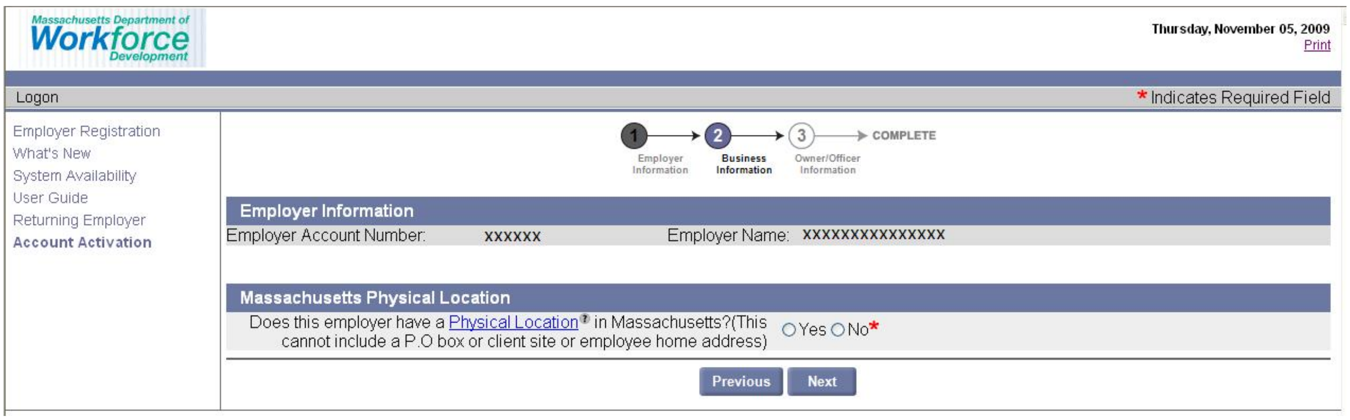
8. Continue to enter the business information and click 'Next'.



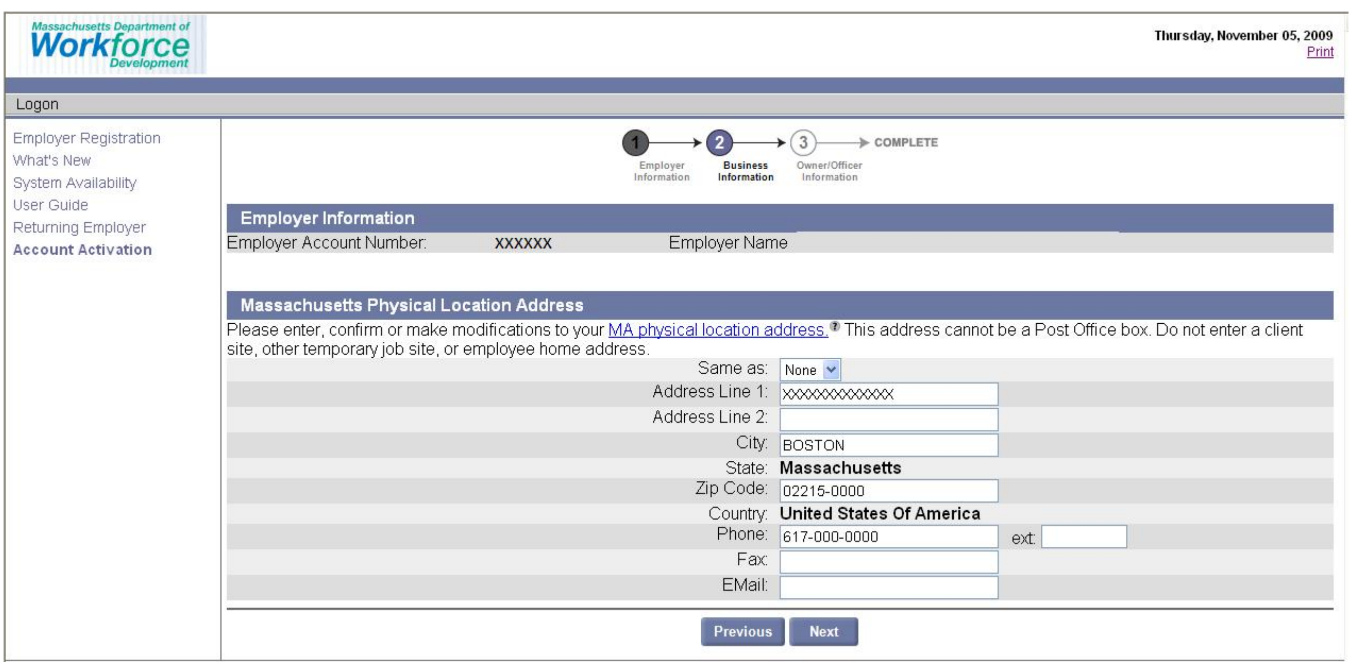
9. You will be asked to verify your legal address that already exists in the system. Click 'Next' to continue.



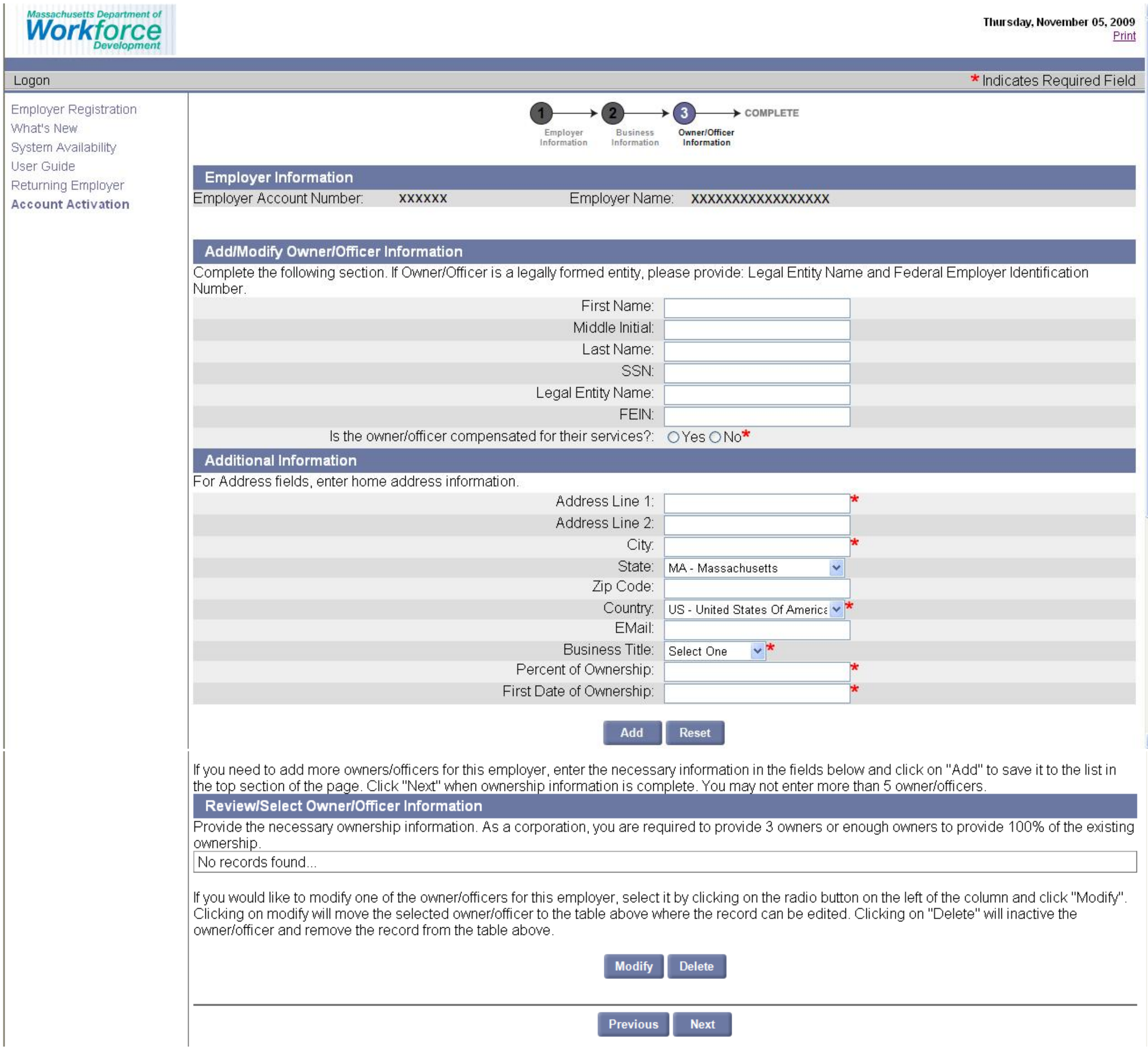
10. The following screen will appear. Complete the requested information and click ‘Next’ to continue.



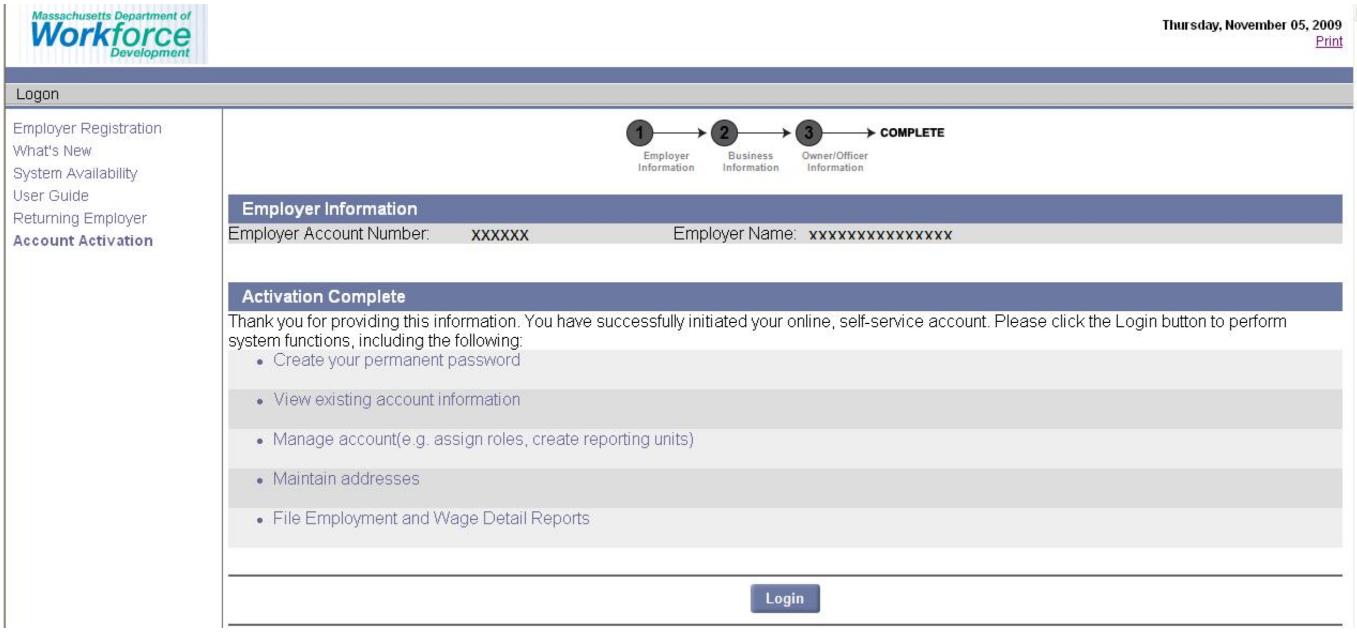
11. The following screen will appear. Complete the requested information and click ‘Next’ to continue.



12. The following screen will appear. Complete the requested information and click ‘Next’ to continue.



13. The following screen will appear, confirming that your account activation is complete.



14. Upon successfully activating your account, you will receive a permanent user ID and temporary password, by U.S. mail. You will be able to login to your account, using those credentials. If required, please refer to the step by step instructions for initial login in the section 'Logging In and Navigation'.

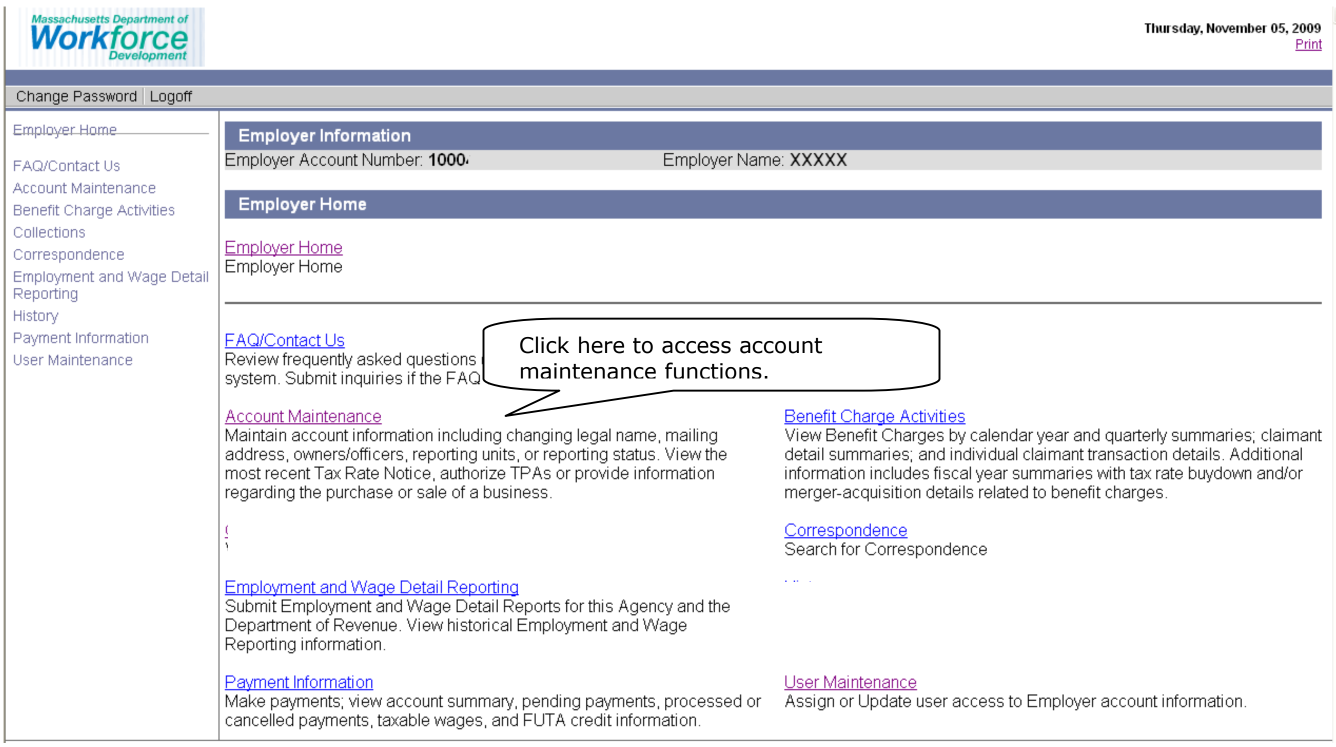
Employer Account Maintenance

NAVIGATING TO ACCOUNT MAINTENANCE

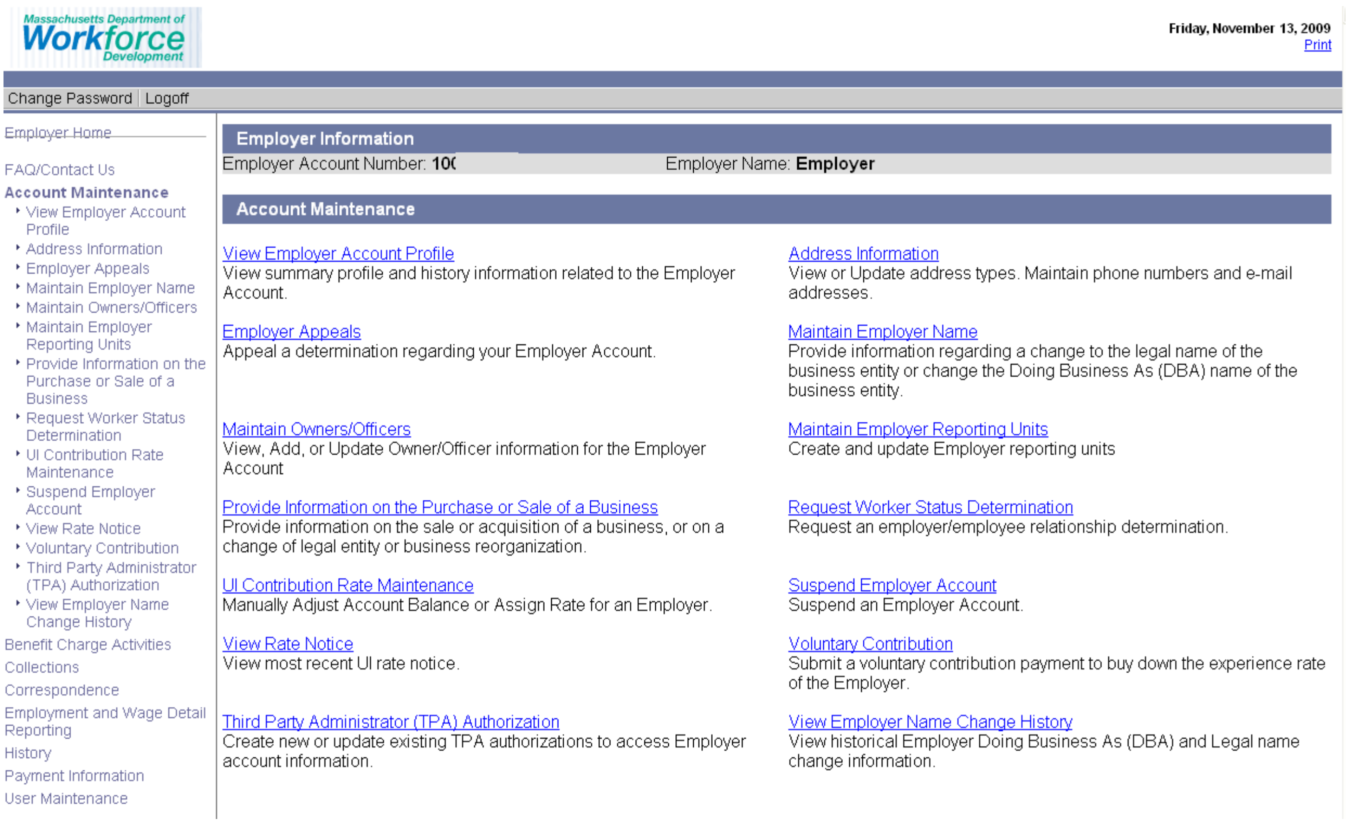
Introduction	This section of the document will explain how an authorized user can navigate to the Account Maintenance functions.

Step-by-Step Instructions:

1. While logged into the employer home page, click on the link 'Account Maintenance'.



2. The following page will appear, listing the available account maintenance functions. Click on the corresponding link to access a function.



If	Then
You are unable to locate the required maintenance function	You may not have sufficient privileges to perform this function. Contact your system administrator.

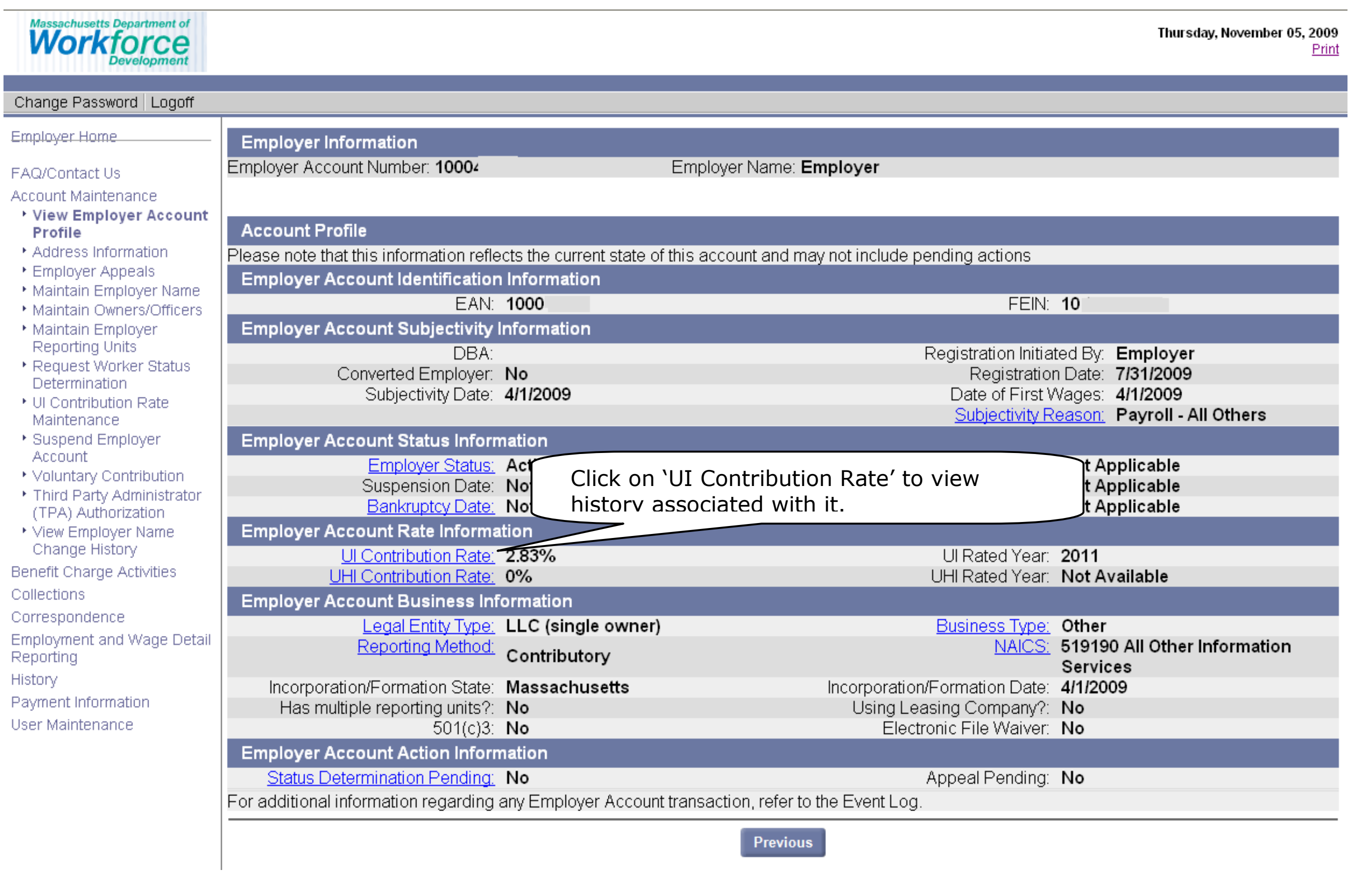
VIEW EMPLOYER ACCOUNT PROFILE

Introduction	This section of the document will explain how an authorized user can view employer account information including histories for selected profile elements. The process ends when the user completes viewing employer account information.

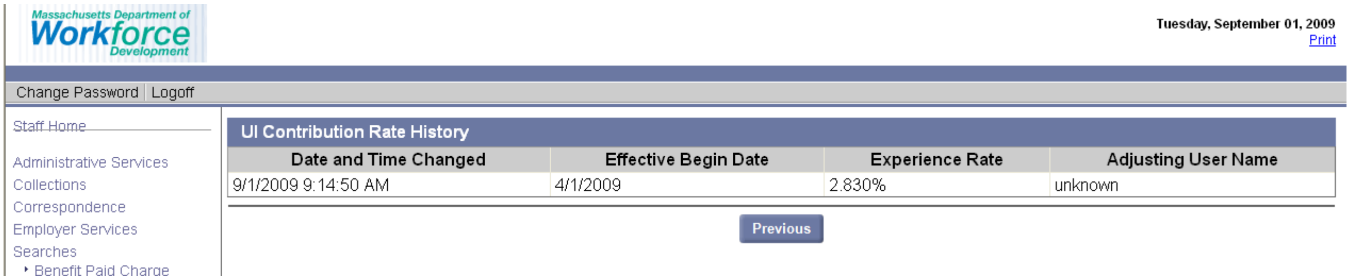
Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the link 'Account Profile'. The account profile will appear in detail as shown below. If you wish to look at history associated with a specific account profile (for example: UI Contribution Rate), click on the specific profile.



3. The history will appear as shown in the screenshot below.



Date and Time Changed	Effective Begin Date	Experience Rate	Adjusting User Name
9/1/2009 9:14:50 AM	4/1/2009	2.830%	unknown

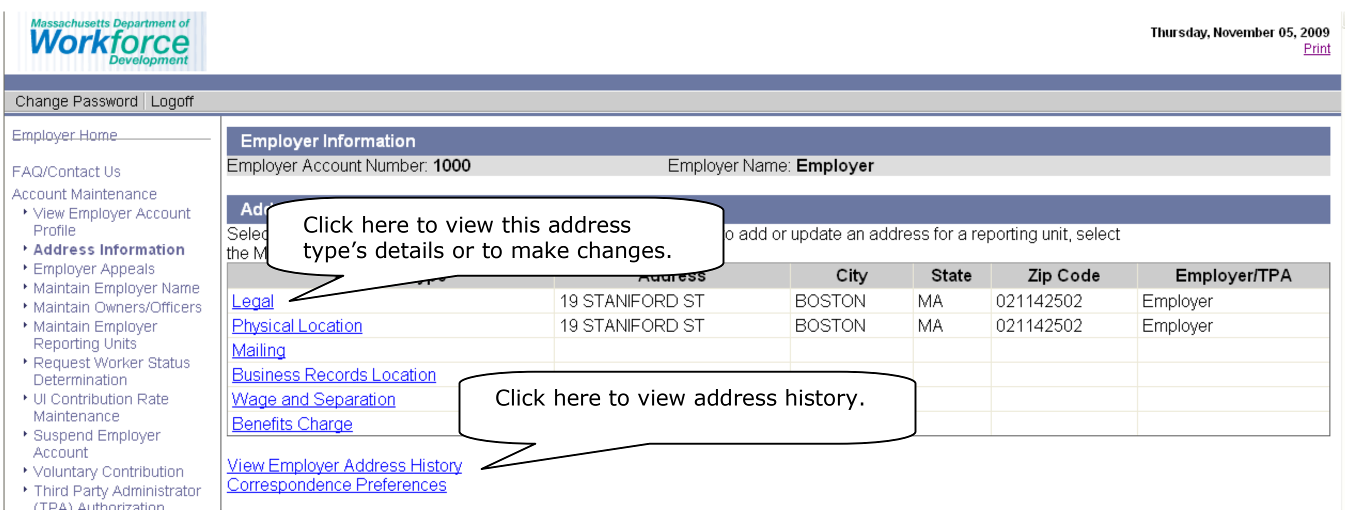
ADDRESS INFORMATION

Introduction	This section of the document will explain how an authorized user can view the primary address information on an employer account and modify it when necessary. An employer account can have up to six different types of addresses; only one address can exist per type. The six types are: Physical Location, Legal, Mailing, Business Records Location, Wage and Separation and Benefits Charge.
Helpful Hints	It is possible for an employer to have reporting units attached to the primary account. In that case, two types of addresses are allowed on each reporting unit: Physical Location and Wage and Separation. However, address maintenance for reporting units is not possible on the 'Address Information' page that is discussed in this section. Please refer to the 'Maintain Reporting Units' section for Reporting Unit address maintenance.

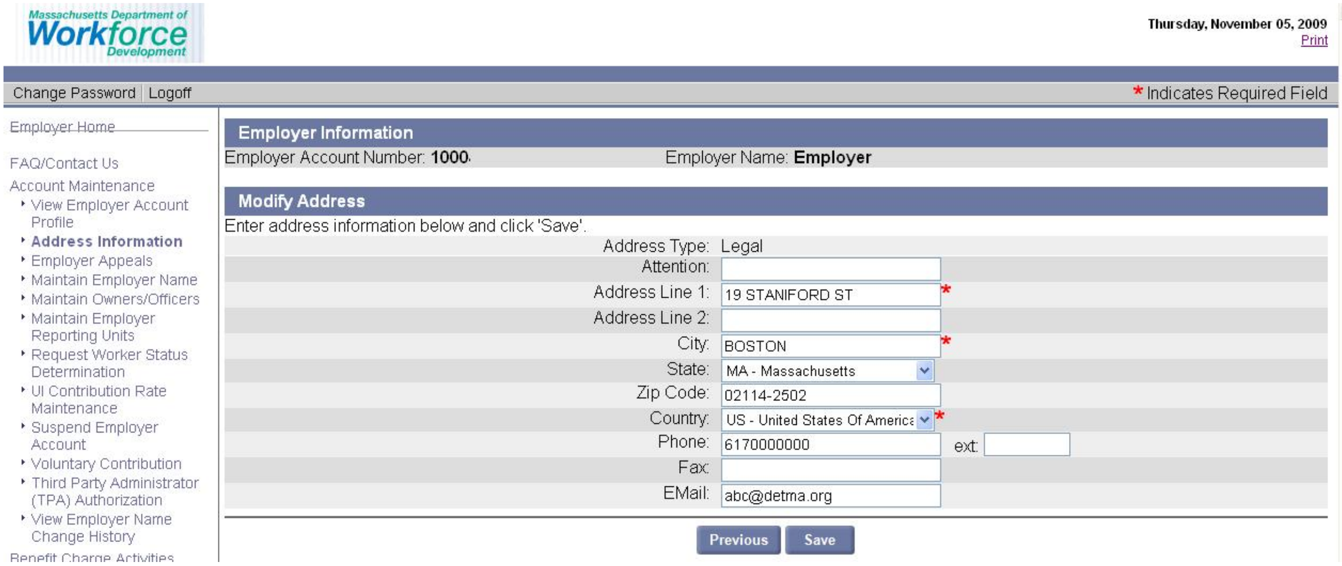
Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the link 'Address Information' from the list of available maintenance functions. The screen shown below will appear.

NOTE: If you wish to see the log of events associated with address changes in the past, click on 'View Employer Address History'.



3. Click on the address type you wish to view and/or modify.
4. On the address details page, make changes as necessary and click on 'Save'. Otherwise, return to the previous menu by clicking on 'Previous'.



5. Viewing/modifying address information is complete.

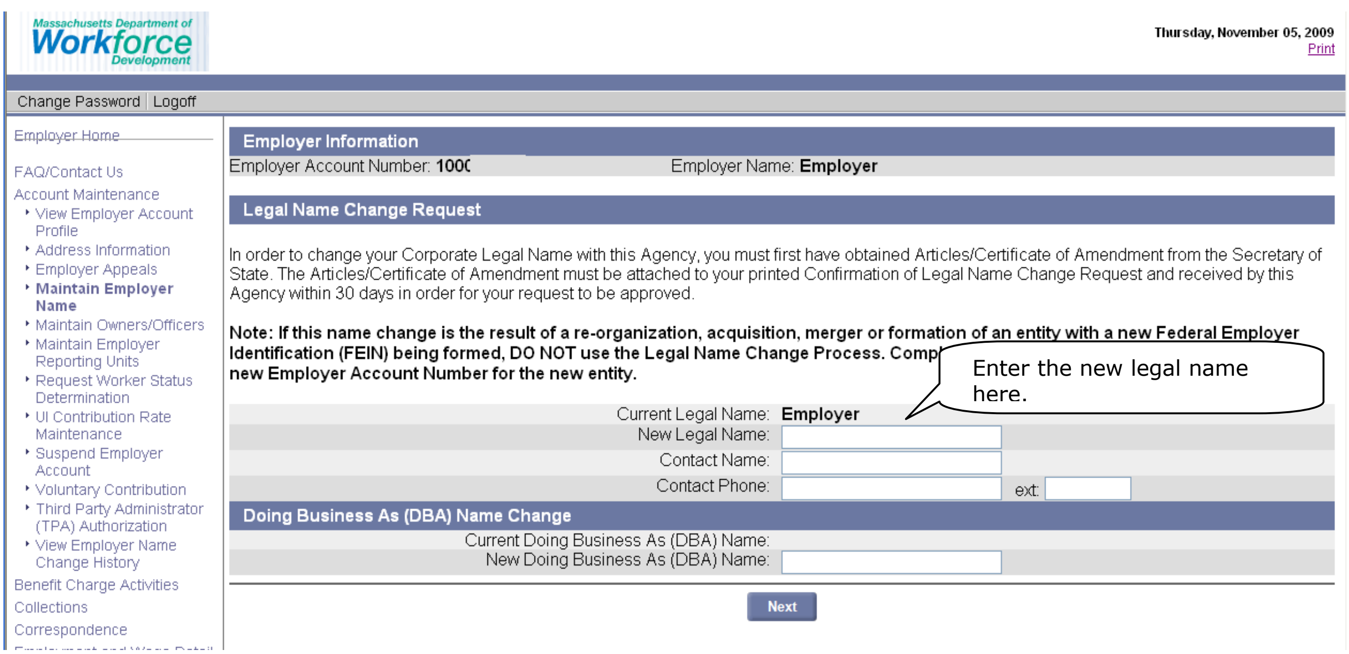
MAINTAIN EMPLOYER NAME

Introduction	This section of the document will explain how an authorized user can modify an employer's legal and/or DBA name. In order to change the legal entity name with DUA, the employer should have obtained Articles/Certificate of Amendment from the Secretary of State. The Articles/Certificate of Amendment must be attached to the printed confirmation of legal name change request and received by DUA within 30 days for the request to be approved. Upon receipt of documents, DUA staff will review them and deny or allow the request. If 30 days have passed since the initiation of the request without the receipt of documents, the name change request will be cancelled automatically. It is also possible to view the name change history associated with an employer account.

Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Employer Name' link from the list of available maintenance functions. The screen shown below will appear. Enter the new legal name and/or 'Doing Business As' name and click on 'Next'.

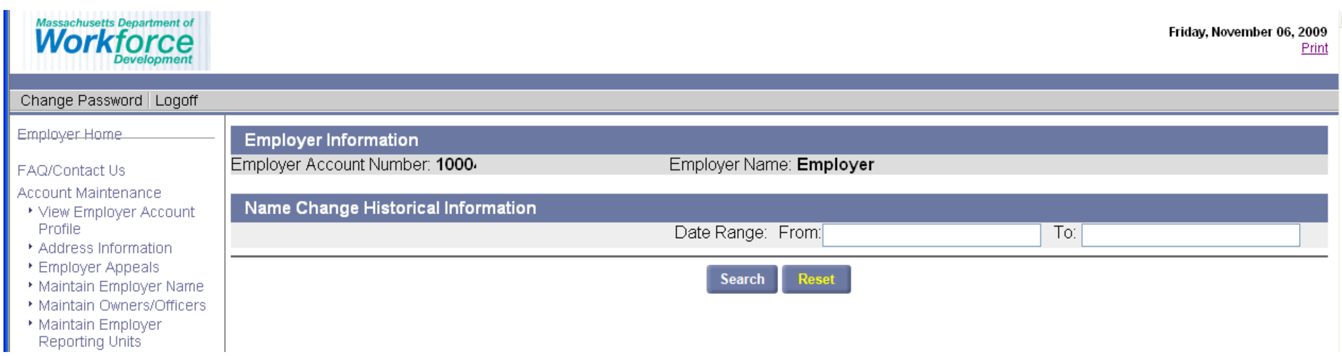


3. On the subsequent page, you will be asked to confirm your chosen name change request(s). Please confirm the name change by clicking 'Submit' or return to the previous page if required.

4. Upon you confirming the name change request, the following page will appear.

View Employer Name Change History:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'View Employer Name Change History' link from the list of available maintenance functions.



3. Enter a date range if you wish to limit the search results to a specific period of time. Click on 'Search'.
4. The name change history will be displayed (if previous name changes exist).

If	Then
The name change is the result of a re-organization, acquisition, merger or formation of an entity with a new Federal Employer Identification (FEIN).	The legal name change process cannot be used. A new employer registration must be completed.

MAINTAIN OWNERS/OFFICERS

Introduction	This section of the document will explain how an authorized user can view/modify/add owner/officer information.
Helpful Hints	• The combined ownership percentage of all owners on the account cannot exceed 100%. • It is not possible to add a second owner/officer when the business type is sole proprietorship. • The owner can be an individual owner or a legally formed entity. • The ownership information that can be added to an account is limited to five.

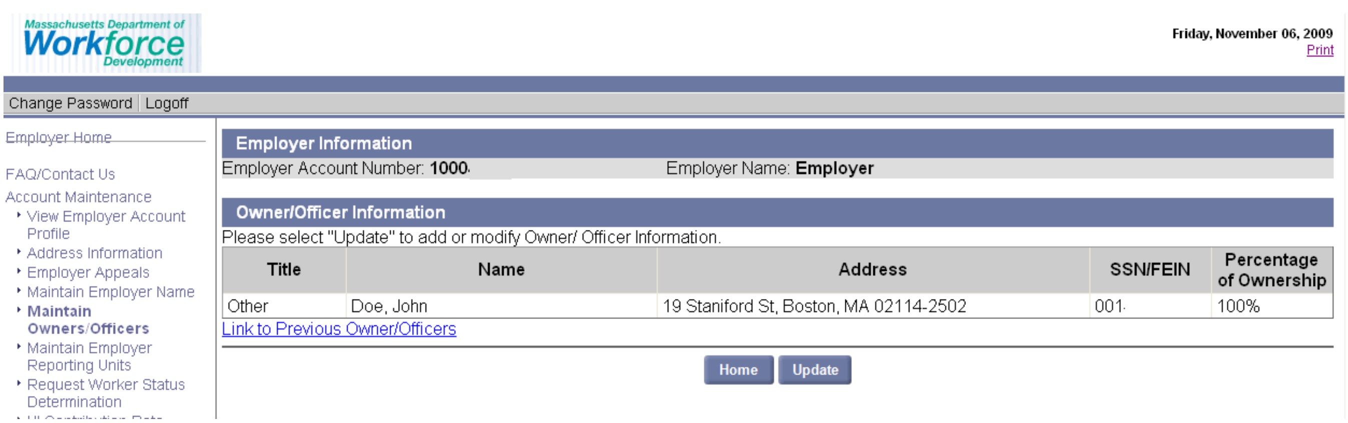
Step-by-Step Instructions:

Viewing owner/officer information:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Owners/Officers' link from the list of available maintenance functions. The screen shown below will appear and you can view the owner/officer information.

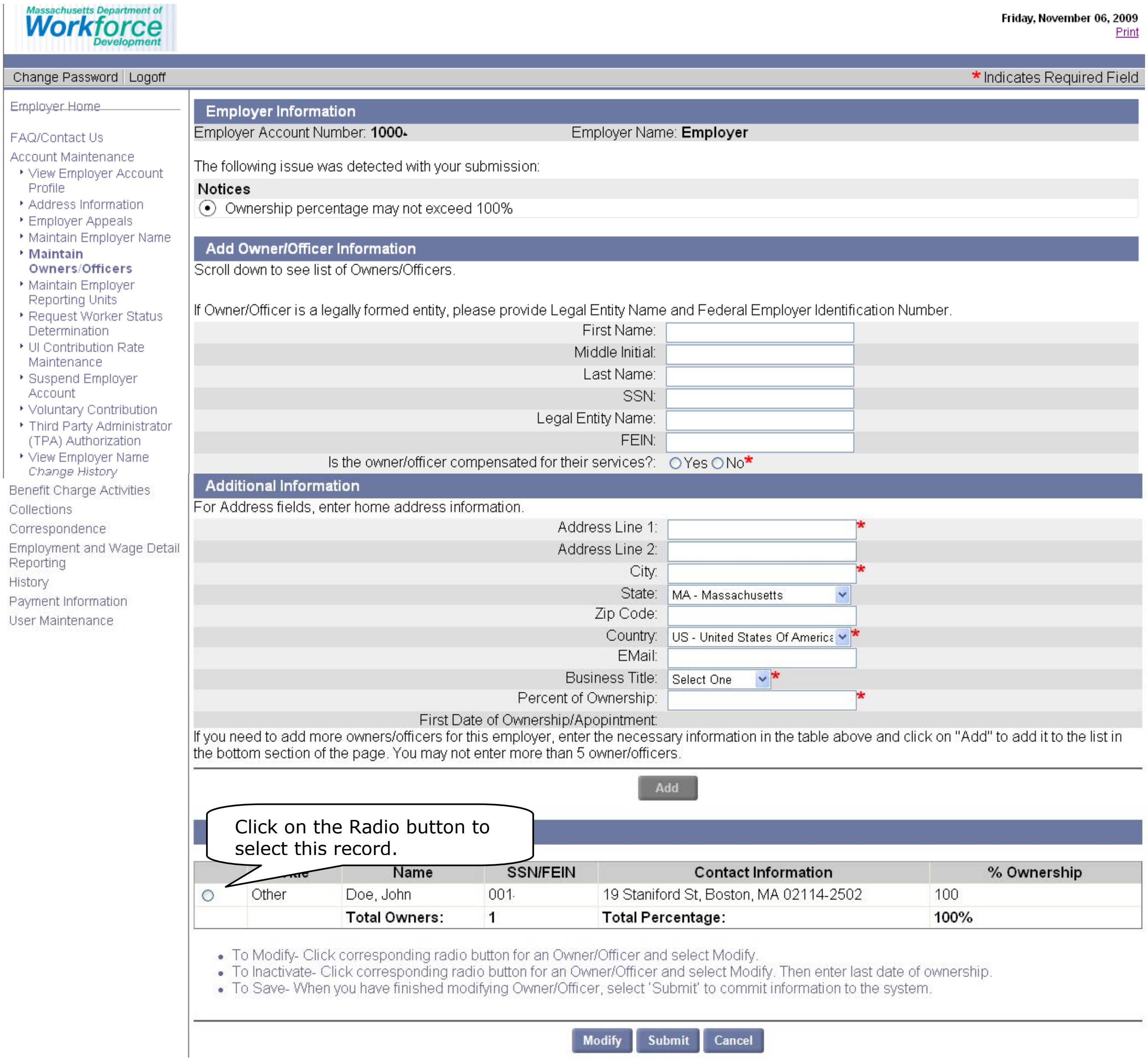
NOTE: If you wish to see the history associated with the owner/officer information, click on 'Link to Previous Owner/Officers'.



Modifying owner/officer information:

1. Follow the steps outlined in section 'Viewing owner/officer information'.

2. Click on 'Update' to modify owner/officer information. The following screen will appear.



3. Choose the owner/ officer record you wish to modify by clicking on the radio button and click 'Modify'.
4. Enter the information you wish to modify.
5. To inactivate an existing owner/officer enter the effective end date of ownership.
6. Click on 'Submit' to complete the modification.

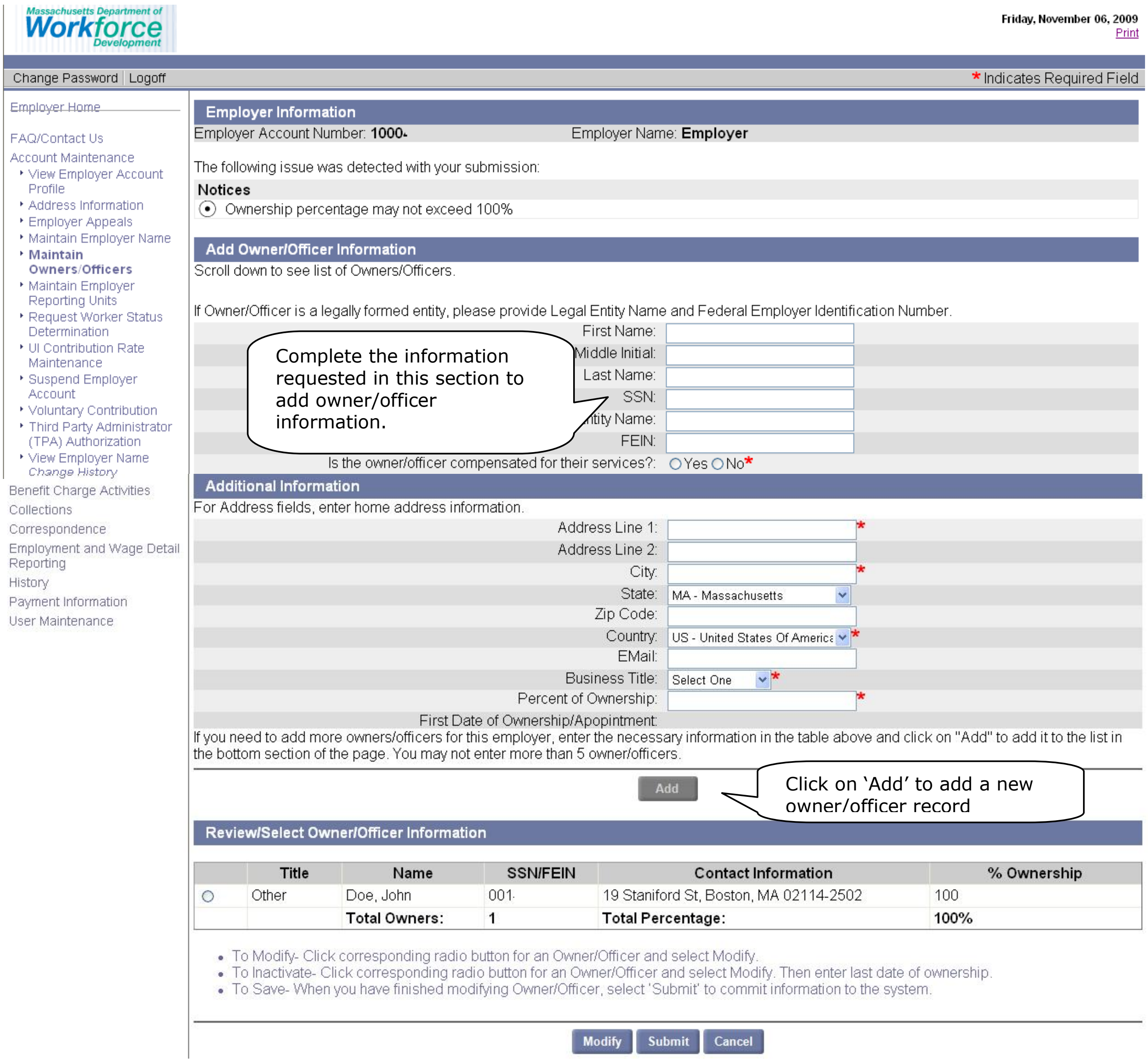
Adding owner/officer information:

1. Follow the steps outlined in section 'Viewing owner/officer information'.

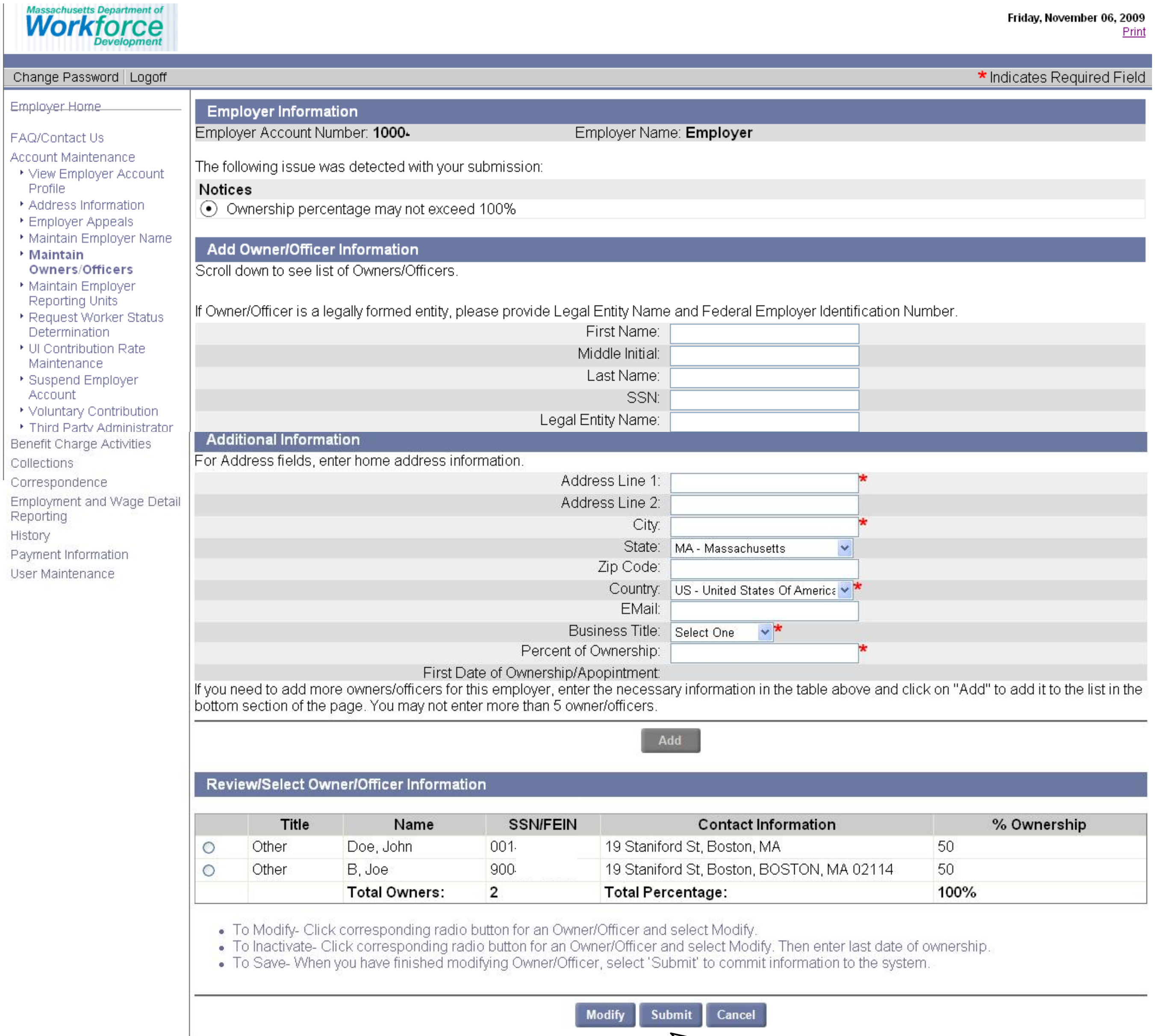
2. Click on 'Update' to modify the owner/officer information.

3. On the screen that appears below, enter the owner/officer information and click on the 'Add' button.

NOTE: If you are adding a legal entity as owner/officer, the only identifying information provided should be the name of the Legal Entity and FEIN. If an individual is being added as owner/officer, the only identifying information provided should be the individual's name and SSN. **Do not enter both sets of identifying information under the same record.**



4. The following screen will appear with the new owner/officer information added. Click 'Submit' to confirm your changes.



Click 'Submit' to confirm your changes.

5. This process is complete.

If	Then
Change of owner/officer information is due to purchase or sale of a business	You must use the process 'Provide information on the sale or purchase of a business.'

MAINTAIN EMPLOYER REPORTING UNITS

Introduction	This section of the document will explain how an authorized user can view/add/modify an employer reporting unit. Additional reporting units can be added to an employer account when the business has multiple reporting units or for administrative reasons. Each reporting unit can have its own NAICS code, 'Doing Business As' (DBA) name, physical location/wage and separation address.
Helpful Hints	1. The physical location for a reporting unit can never be modified. If the physical location of a reporting unit has to be changed, then the existing unit has to be inactivated and a new reporting unit has to be created. 2. All registered employers within the system are defaulted to the '00000' reporting unit.

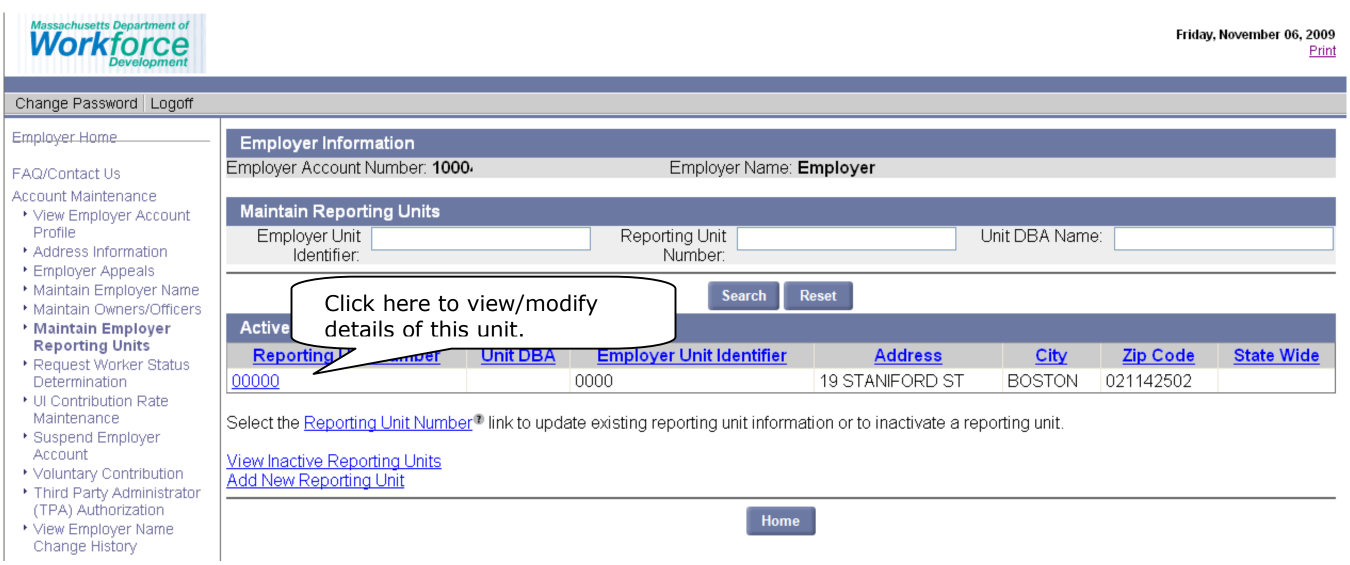
Step-by-Step Instructions:

Viewing Employer Reporting Units:

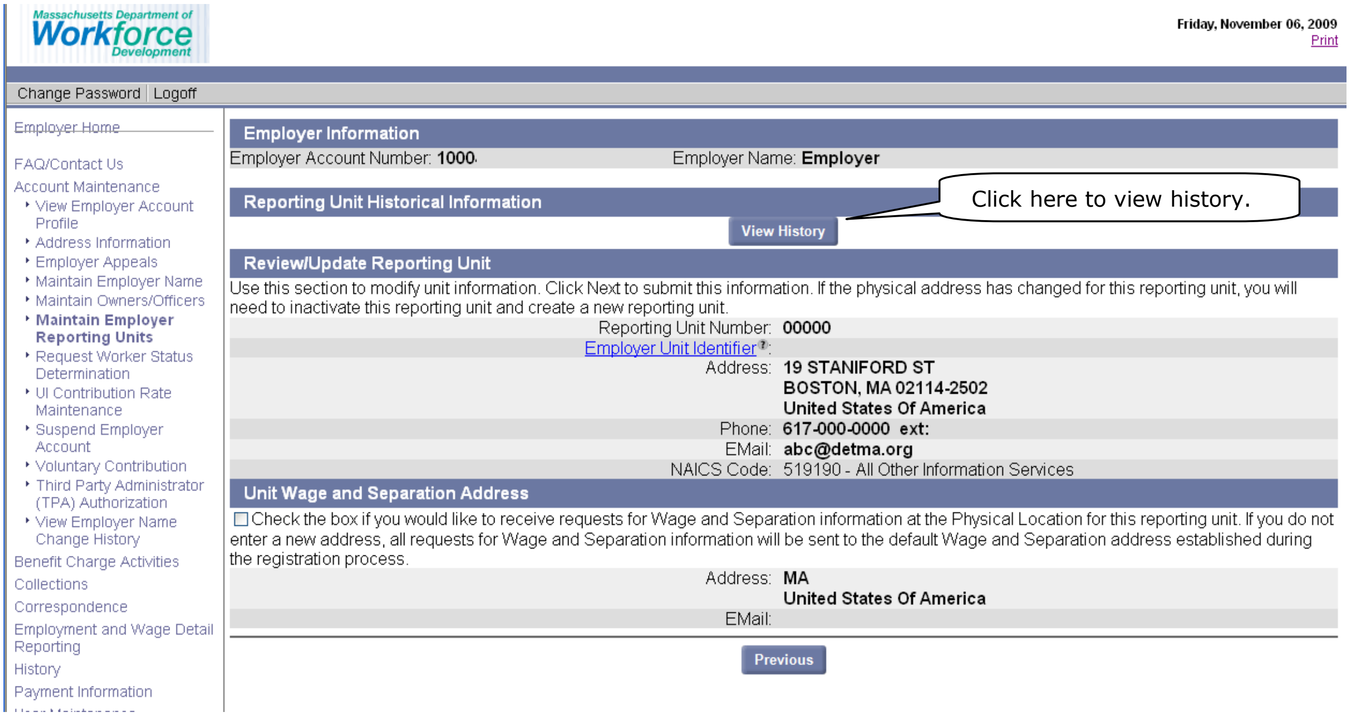
1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'Maintain Employer Reporting Units' link from the list of available maintenance functions. The screen shown below will appear. Click on the reporting unit number to view the reporting unit profile.

NOTE: Reporting units that have been inactivated can be viewed by clicking on link 'View Inactive Reporting Unit'.



3. The following page will open upon clicking the reporting unit number.



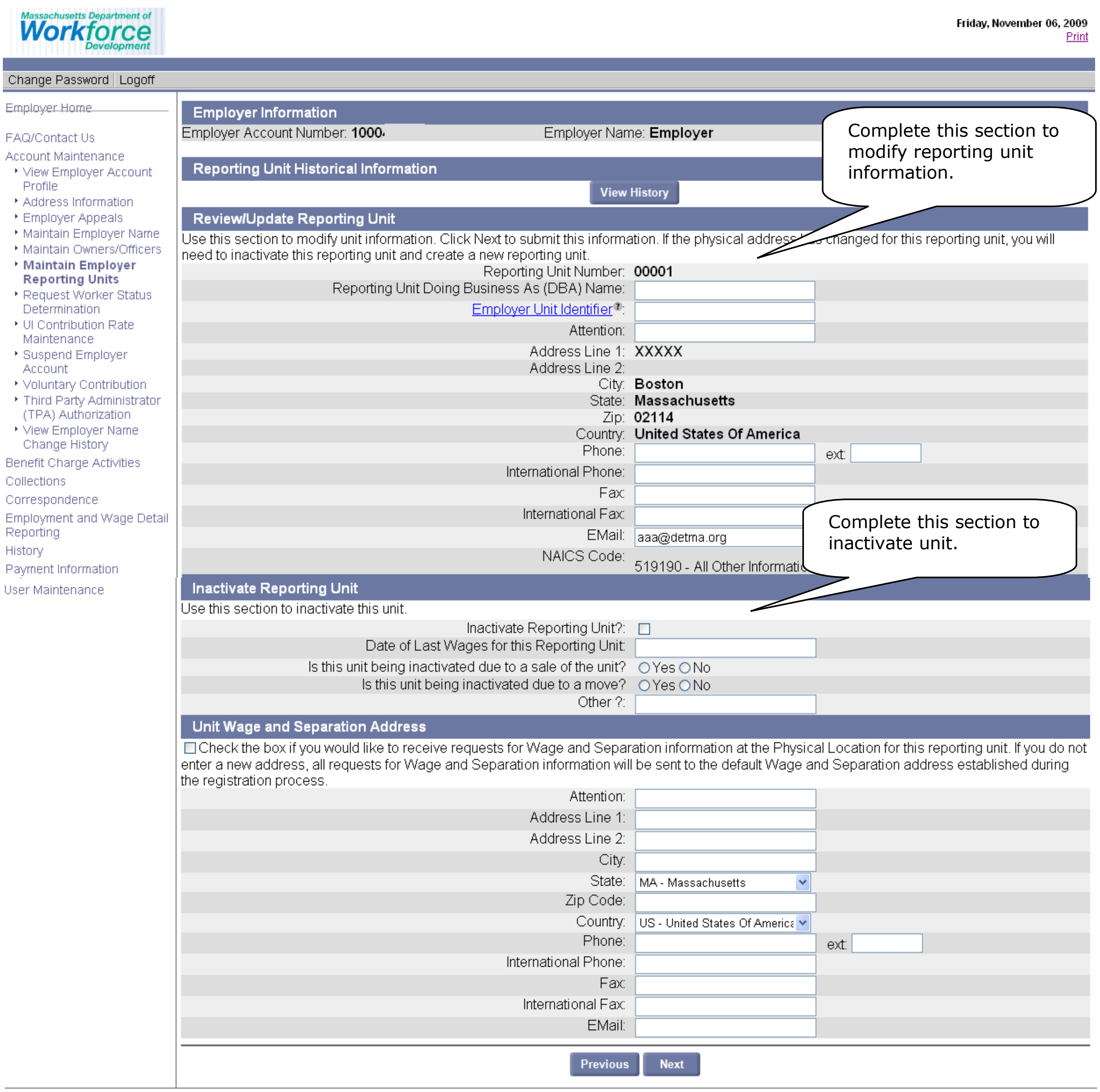
4. The historical information associated with a reporting unit can be viewed by clicking 'View History' on the page shown above.

NOTE: The historical information is a log of events associated with the changes made on the reporting unit's NAICS Code, Wage and Separation address and account status.

Modifying / Inactivating Employer Reporting Unit:

1. Follow the first 3 steps outlined in 'Viewing Employer Reporting Unit' to arrive at the reporting unit page on which you wish to make changes.

2. The page will appear as shown below.



3. Make changes to NAICS code or unit wage and separation address as desired. Proceed to step 6 for instructions to inactivate this reporting unit.

NOTE: The details associated with the primary reporting unit cannot be modified.

4. Click 'Next' at the bottom of the page to submit your changes.

5. On the next page, you will be asked to confirm your changes. Confirm your changes by clicking 'Save'. The modification action will be completed.

6. Continued from step 3: In order to inactivate the unit, complete the information requested in the section 'Inactivate Reporting Unit' of the page (shown in step 2).

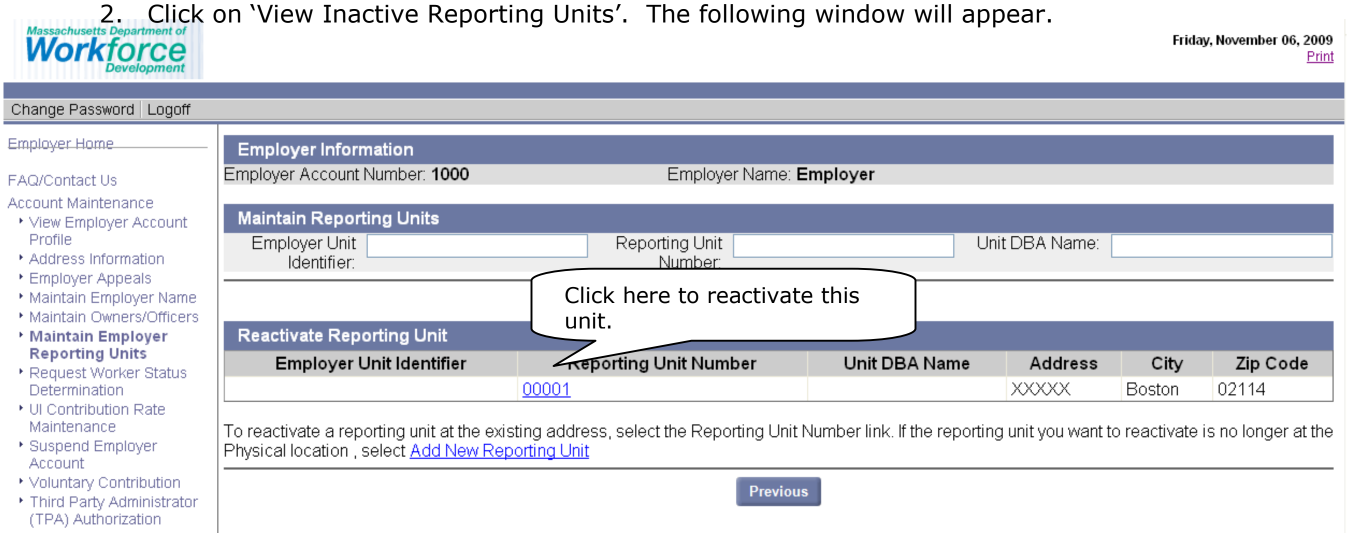
7. You will be asked to confirm the inactivation. Upon your confirmation, the unit will be inactivated and the following page will appear.

NOTE: If the inactivation is due to sale of the unit, you will be redirected to the 'Experience Transfer' process, and you must continue to provide information on that. Please refer to the section on experience transfer - 'Provide information on the Sale or Purchase of a Business' for additional information.

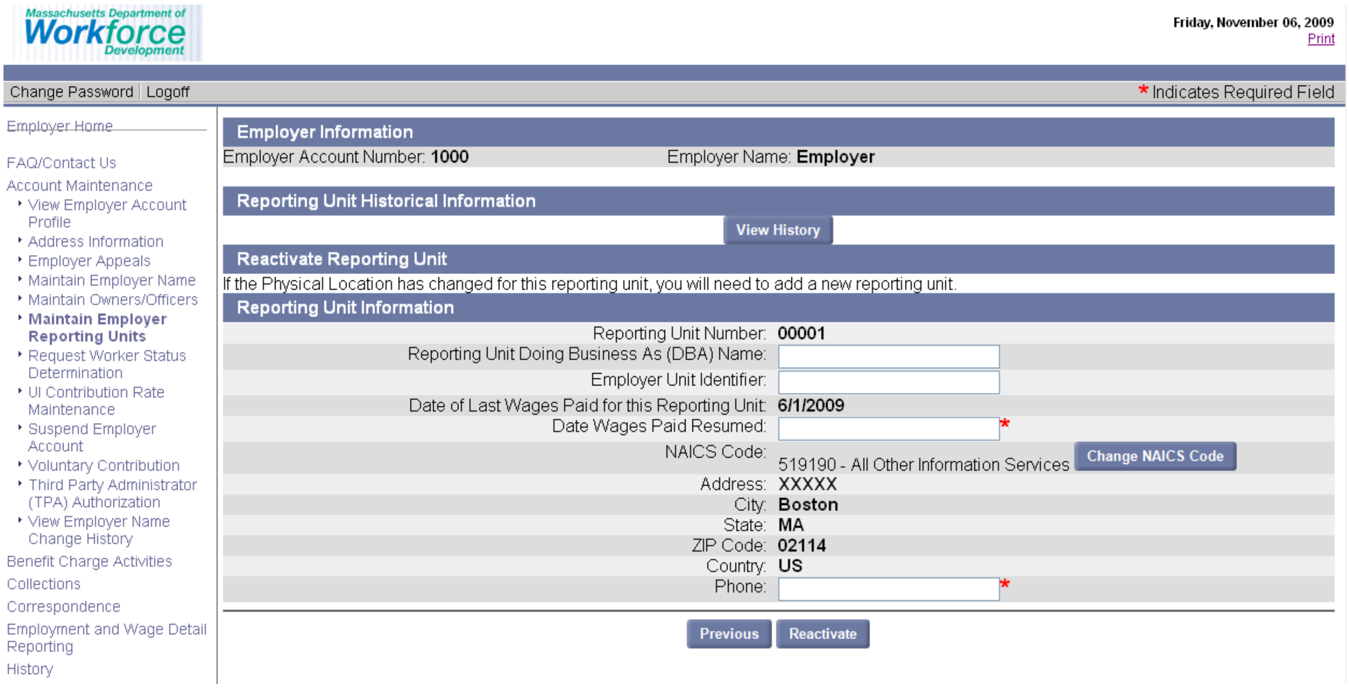
Reactivating Employer Reporting Unit:

1. Follow the first 2 steps outlined in 'Viewing Employer Reporting Unit' to arrive at the reporting unit profile to be re-activated.

2. Click on 'View Inactive Reporting Units'. The following window will appear.



3. Click on reporting unit that needs to be reactivated. Provide the information necessary to reactivate the account and click 'Reactivate'.

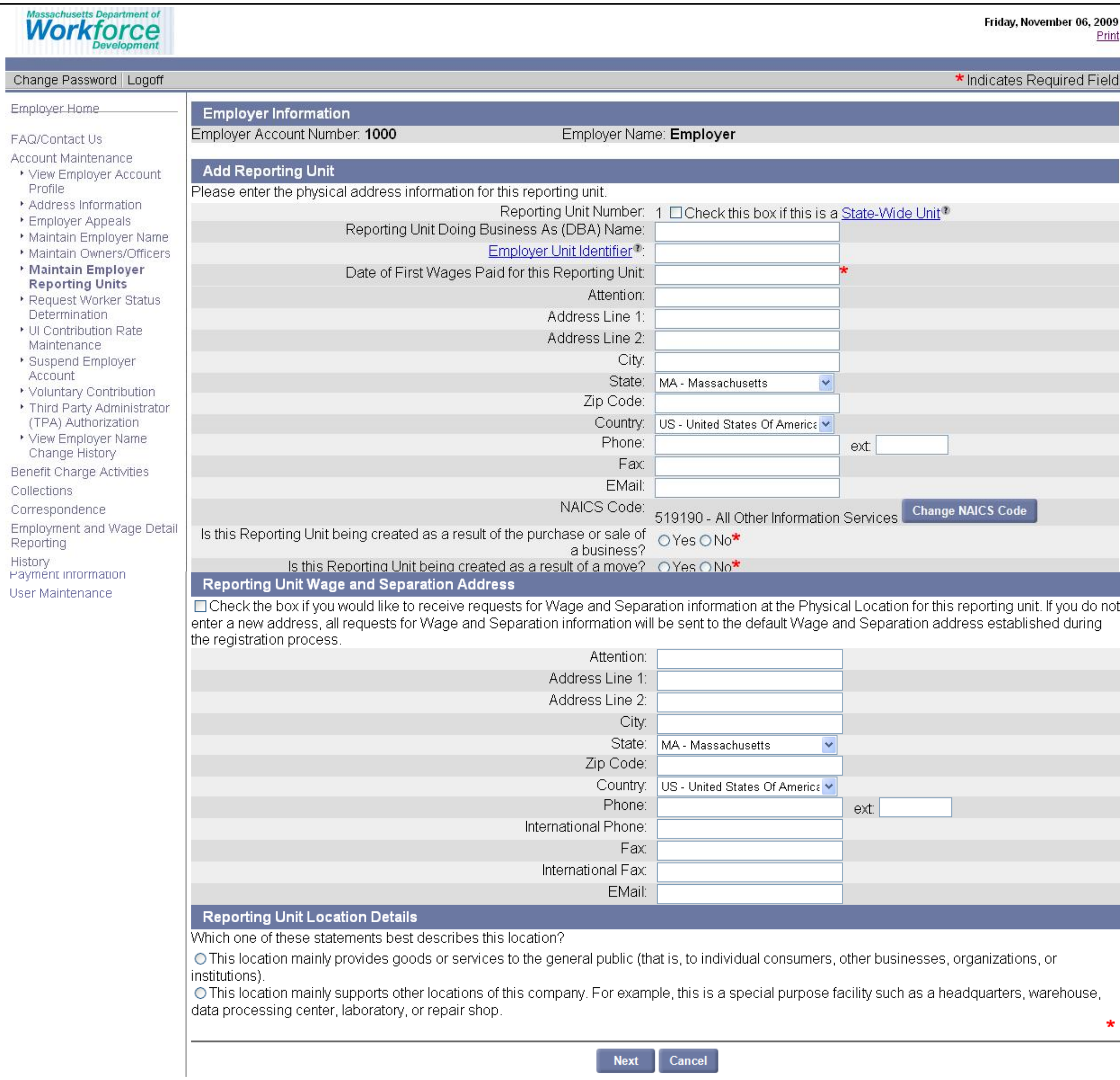


4. You will be asked to confirm the reactivation. Upon your confirmation the account will be reactivated and will appear in the list of active reporting units.

Adding a New Reporting Unit:

1. Follow the first 2 steps outlined in 'Viewing Employer Reporting Unit'.

2. Click on 'Add New Reporting Unit' to add a new unit. The following page will appear. Provide all the information about the new unit and click 'Next'.



5. You will be asked to confirm the details of the new reporting unit on the following page. Upon confirmation, the following page will appear, with the new reporting unit number.

Output 1	A new reporting unit will be assigned its unique ‘Reporting Unit Number’.
Output 2	The employer account will be updated with the latest reporting unit information.

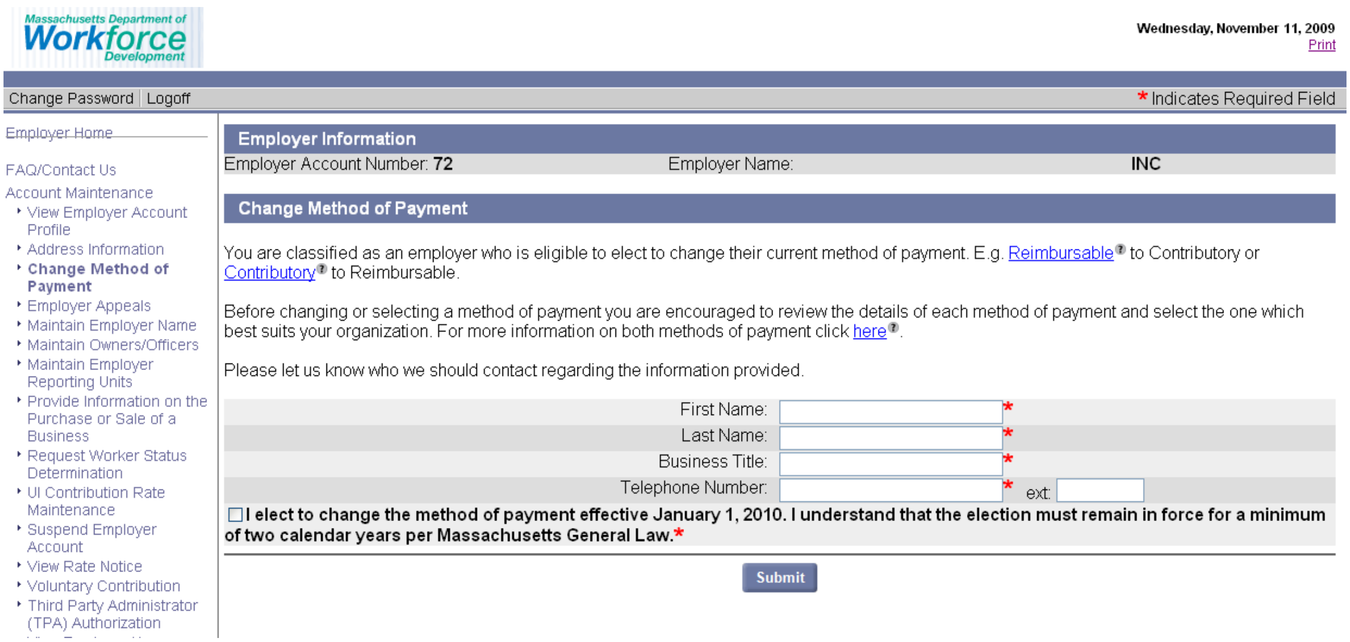
If	Then
Addition/Inactivation/ Reactivation of reporting unit is due to sale or purchase	User will be directed to the process - ’Provide information on the purchase or sale of a business’.

CHANGE METHOD OF PAYMENT

Introduction	This section of the document will explain how an authorized user can submit a request to change the method of payment on an employer account. An eligible employer can elect to change the payment method from reimbursable to contributory or from contributory to reimbursable. In order to be eligible the employer must be a private non-profit employer or a Governmental entity. If a private non-profit employer is requesting that the status be changed to reimbursable, the employer's 501(c)(3) Federal Exemption Letter must be received and/or be on file for the change to take effect. Governmental employees do not need to provide the 501(c)(3) letter to change their status to reimbursable. If your request is to change from reimbursable to contributory status, no documentation is required.
Helpful Hints	• A payment method can be elected only when (1) the annual election window for requesting change of payment method is open for the employer or (2) Employer is registering for the first time and indicates 501(c)(3) status or is a governmental employer. • The annual election window is from the 1st of September to the 1st of December for private non-profit employers; governmental employers can elect a change in payment method between the 1st of September and the 31st of December. • When a change in the method of payment is requested by eligible employers during the annual re-election window, the new payment method will take into effect on 01-Jan of the next year. • If an employer indicates 501(c)(3) status during registration, then they will be initially assigned contributory status. If the 501(c)(3) exemption letter is received within a period of 30 days from registration, the status will be changed to reimbursable, effective from their subjectivity date.

Step-by-Step Instructions:

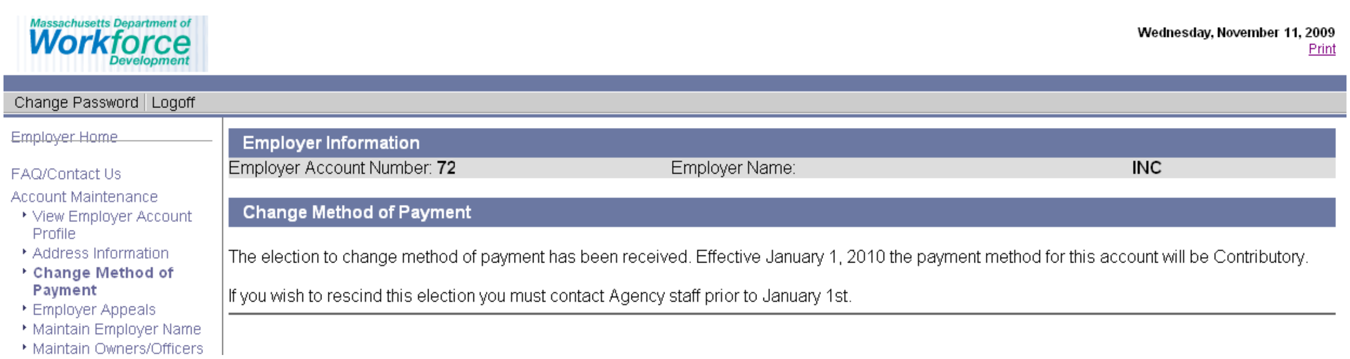
1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Change Payment Method' link from the list of available maintenance functions. The following page will appear. Enter the requested information to complete your changes.



3. Click on 'Submit' to complete your changes. A confirmation will appear as shown below.

NOTE: If Employer payment method is currently contributory, the system will change the payment method to reimbursable on the effective date, provided the federal exemption letter 501(c)(3) letter is received by DUA within a period of 30 days. If the Employer payment method is currently reimbursable, the system will change the payment method to contributory on the effective date. A confirmation will appear as shown in the screen below.

If you wish to rescind your election, you can do so before the election window closes. In order to make the change, you must contact DUA, before the annual election window closes.

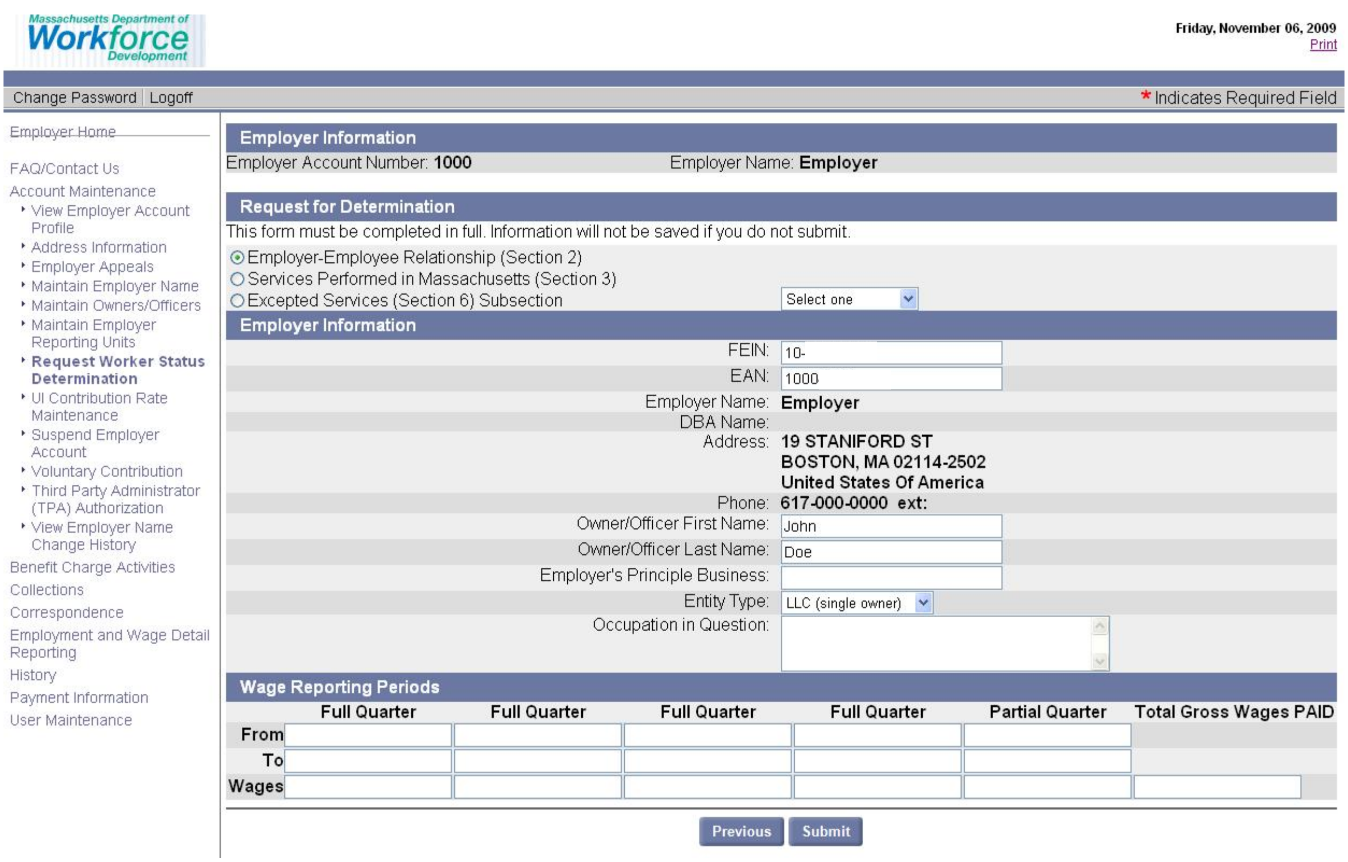


WORKER STATUS DETERMINATION

Introduction	This section of the document will explain how an authorized user can request a worker status determination. Upon your submission of the request, DUA staff will review your request and make a status determination. You will be notified of the status determination once a decision is made.

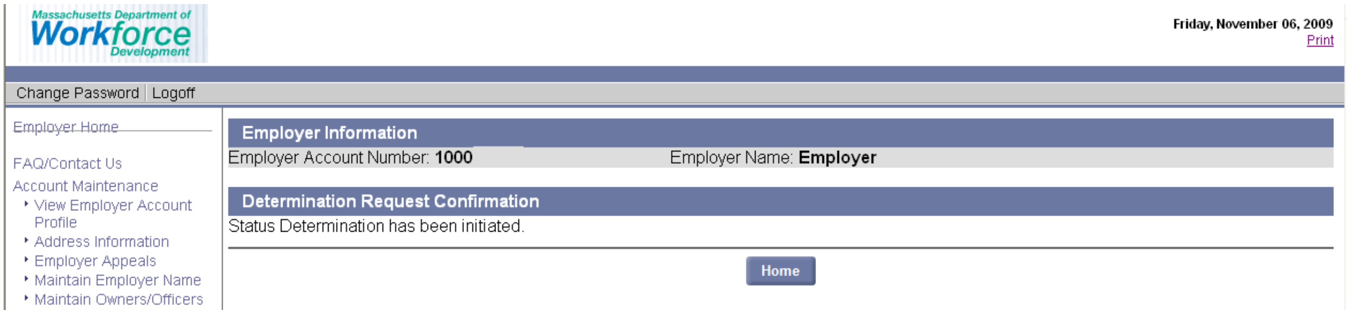
Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Request Worker Status Determination' link from the list of available maintenance services. The screen shown in the next page will be displayed.



3. Enter the information required to submit the request for worker status determination. Click on 'Submit'.

4. A page will be displayed confirming that your request has been submitted.



TPA AUTHORIZATION

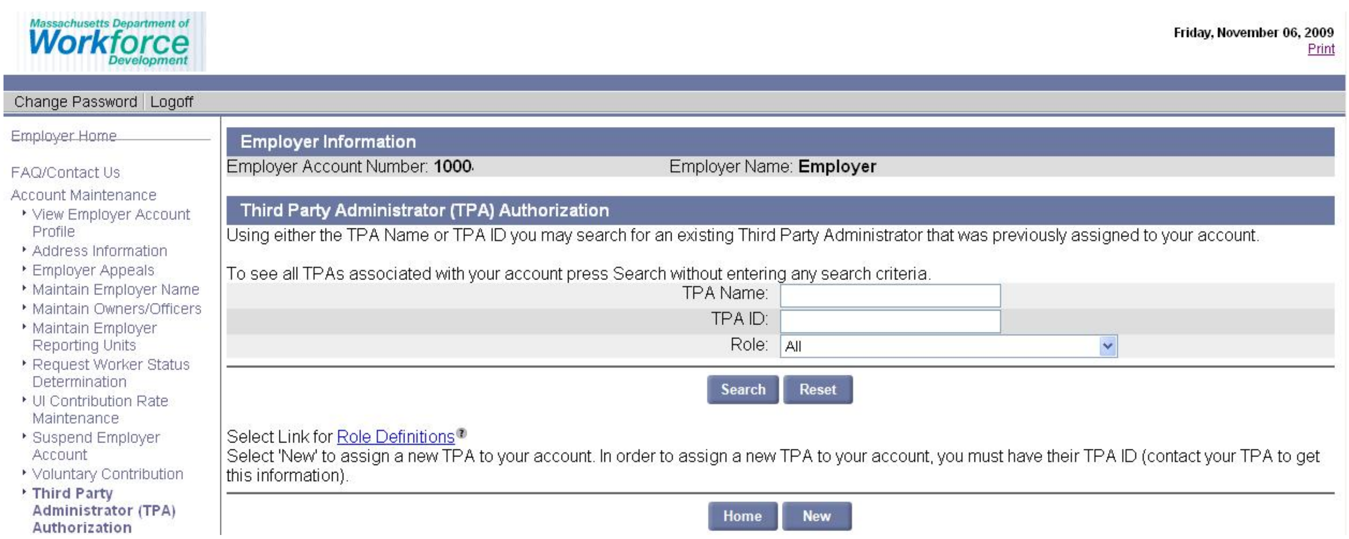
Introduction	This section of the document will explain how an authorized user can create or maintain a Third Party Administrator (TPA) relationship on an employer account. The process begins when an employer elects to update the current relationship with a TPA or create a new TPA relationship. During this process, the functions that the TPA can perform on behalf of the employer are established by role assignment. The process ends with a correspondence being generated to the TPA.
Helpful hints.	Two different TPA accounts can never be associated to the same employer role.

Step-by-Step Instructions:

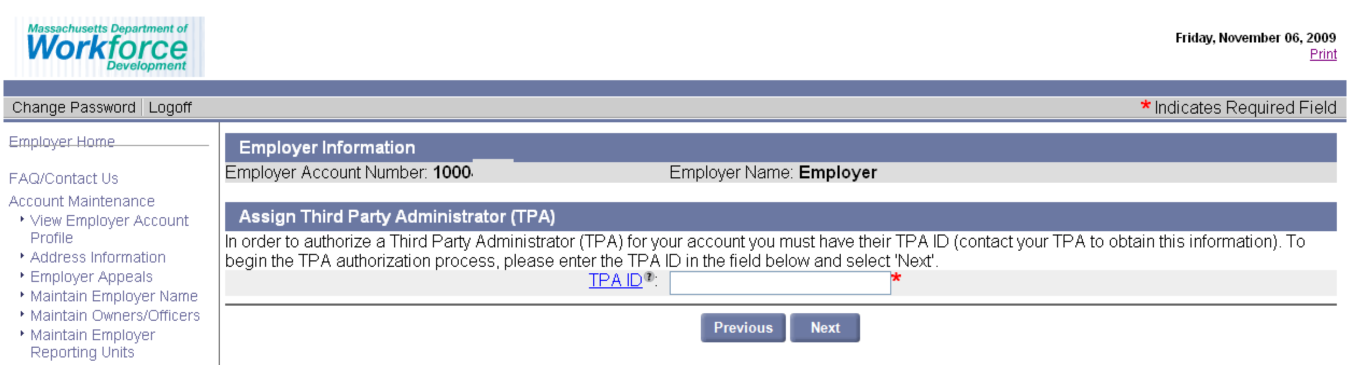
Create a new TPA relationship:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

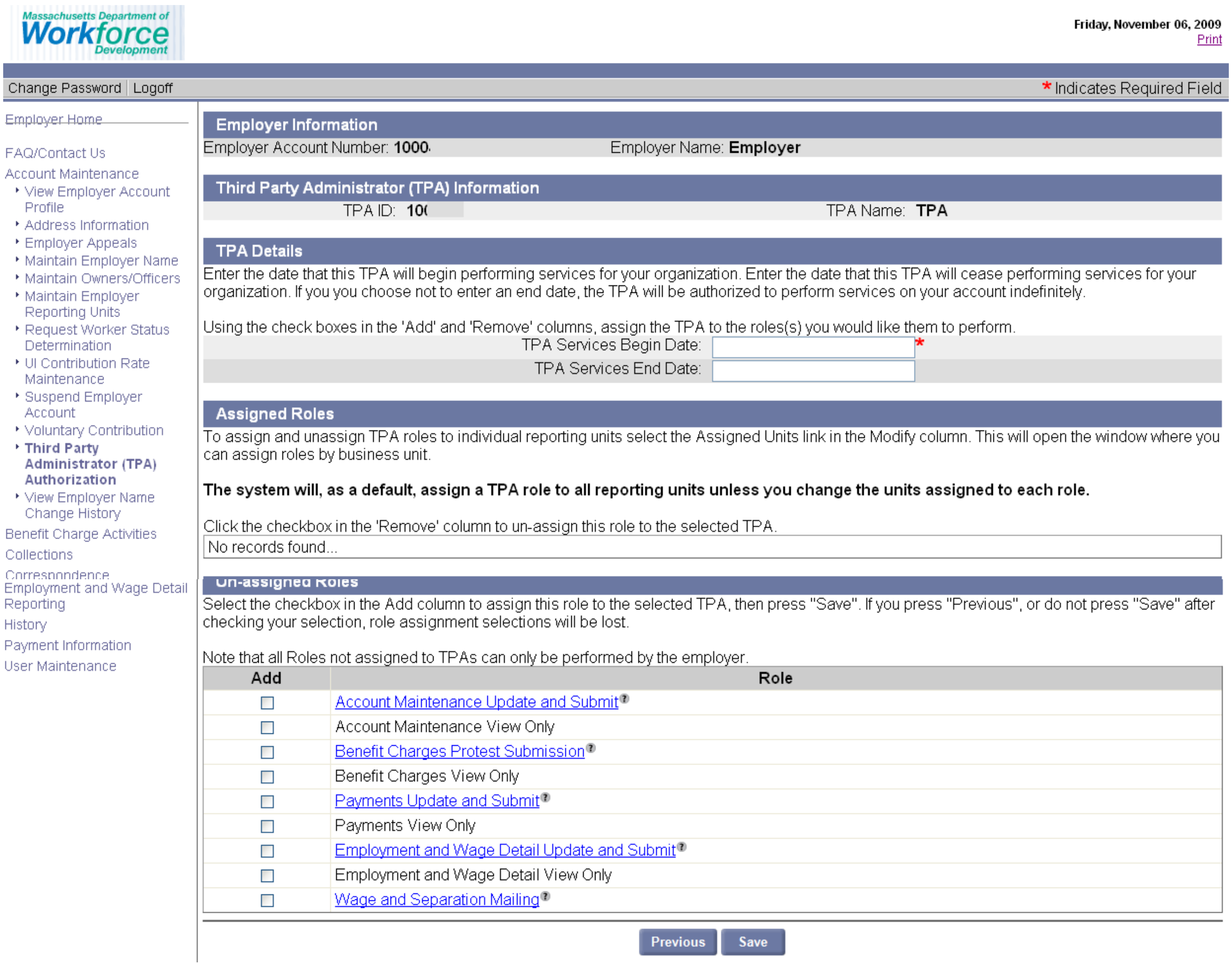
2. Click on the 'Third Party Administrator (TPA) Authorization' link from the list of available maintenance services. The following screen will appear.



3. Click on 'New' to create a new TPA relationship. The following screen will be displayed. Enter the TPA ID you wish to assign to the employer account and click 'Next'.



4. On the page that is displayed, enter the start and end dates for the assignment. Check the boxes against roles that you wish to grant to the TPA.


Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff
* Indicates Required Field

Employer Home

FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- Suspend Employer Account
- Voluntary Contribution
- **Third Party Administrator (TPA) Authorization**
- View Employer Name Change History

Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Third Party Administrator (TPA) Information

TPA ID: **10(** TPA Name: **TPA**

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the roles(s) you would like them to perform.

TPA Services Begin Date: *
TPA Services End Date:

Assigned Roles

To assign and unassign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.

The system will, as a default, assign a TPA role to all reporting units unless you change the units assigned to each role.

Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

No records found...

Un-assigned Roles

Select the checkbox in the Add column to assign this role to the selected TPA, then press "Save". If you press "Previous", or do not press "Save" after checking your selection, role assignment selections will be lost.

Note that all Roles not assigned to TPAs can only be performed by the employer.

Add	Role
☐	Account Maintenance Update and Submit
☐	Account Maintenance View Only
☐	Benefit Charges Protest Submission
☐	Benefit Charges View Only
☐	Payments Update and Submit
☐	Payments View Only
☐	Employment and Wage Detail Update and Submit
☐	Employment and Wage Detail View Only
☐	Wage and Separation Mailing

Previous | Save

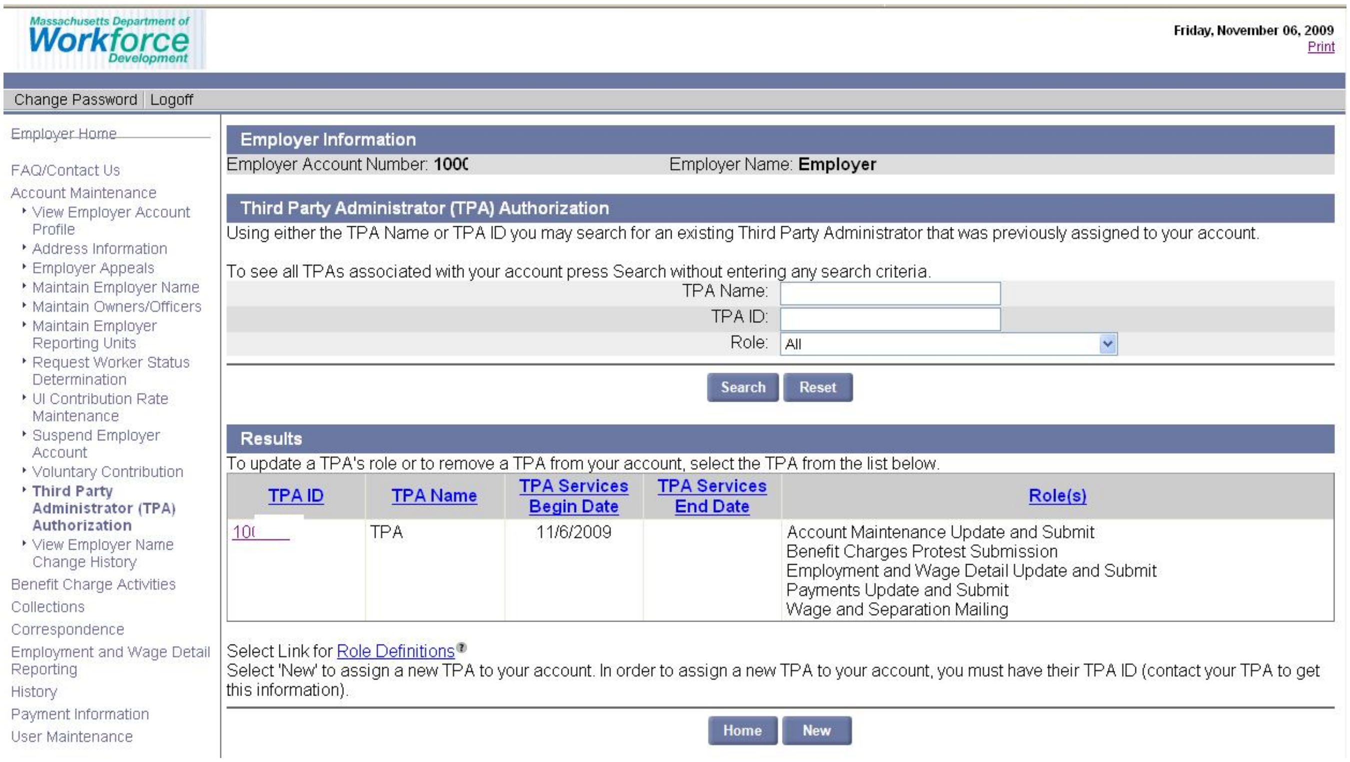
5. Click on 'Save' and the TPA relationship will be established.

Modifying TPA Relationship:

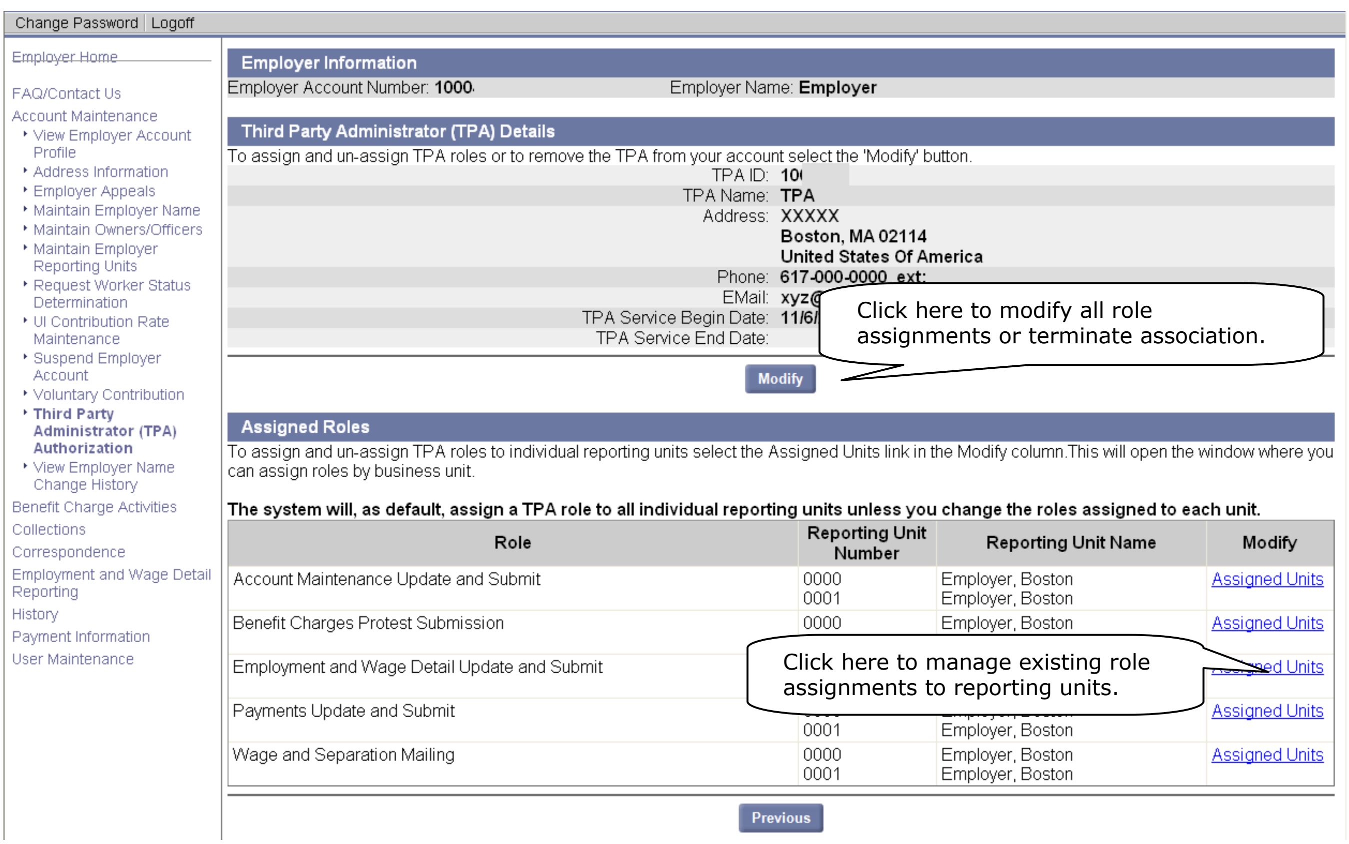
1. Follow the first 2 steps outlined in 'Create a new TPA relationship'. The screen shown below will appear.

2. If you wish to limit your search to a specific TPA, enter the TPA name or ID. Click on 'Search'. Alternatively, click on 'Search' without entering any search criteria to see all TPA(s) associated with the account.

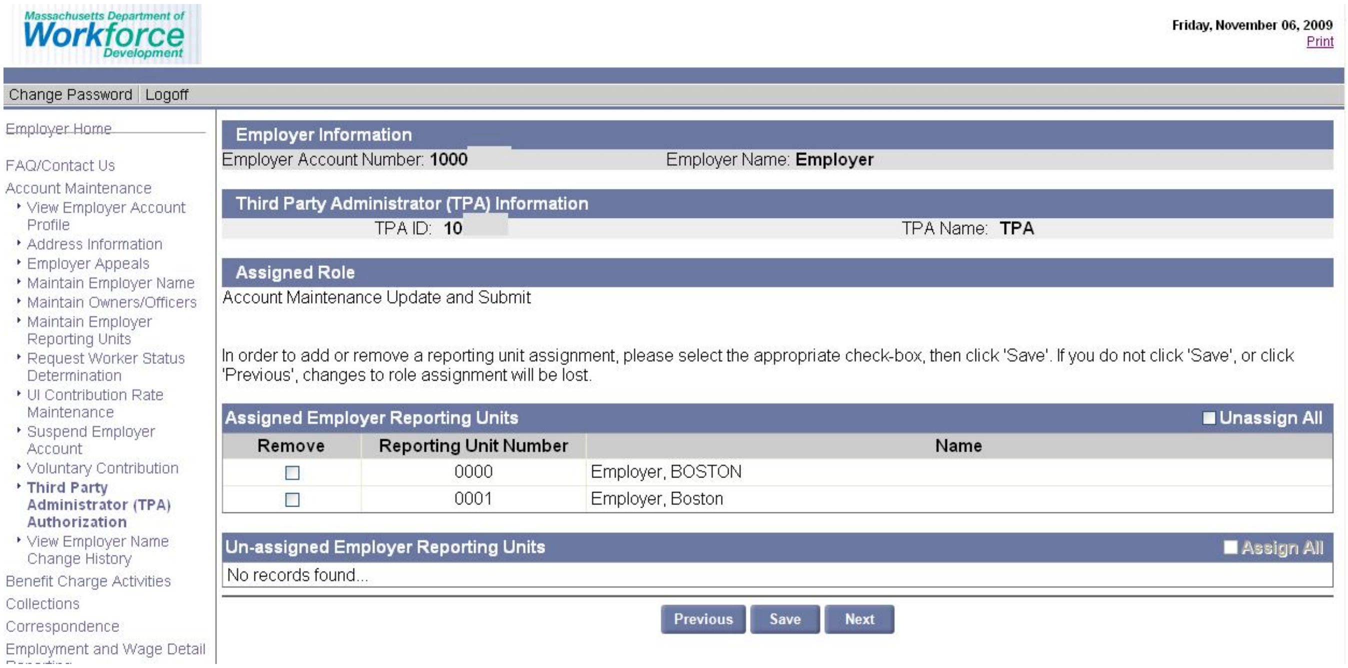
3. The search results will appear as shown below. Click on the TPA ID to update the account.



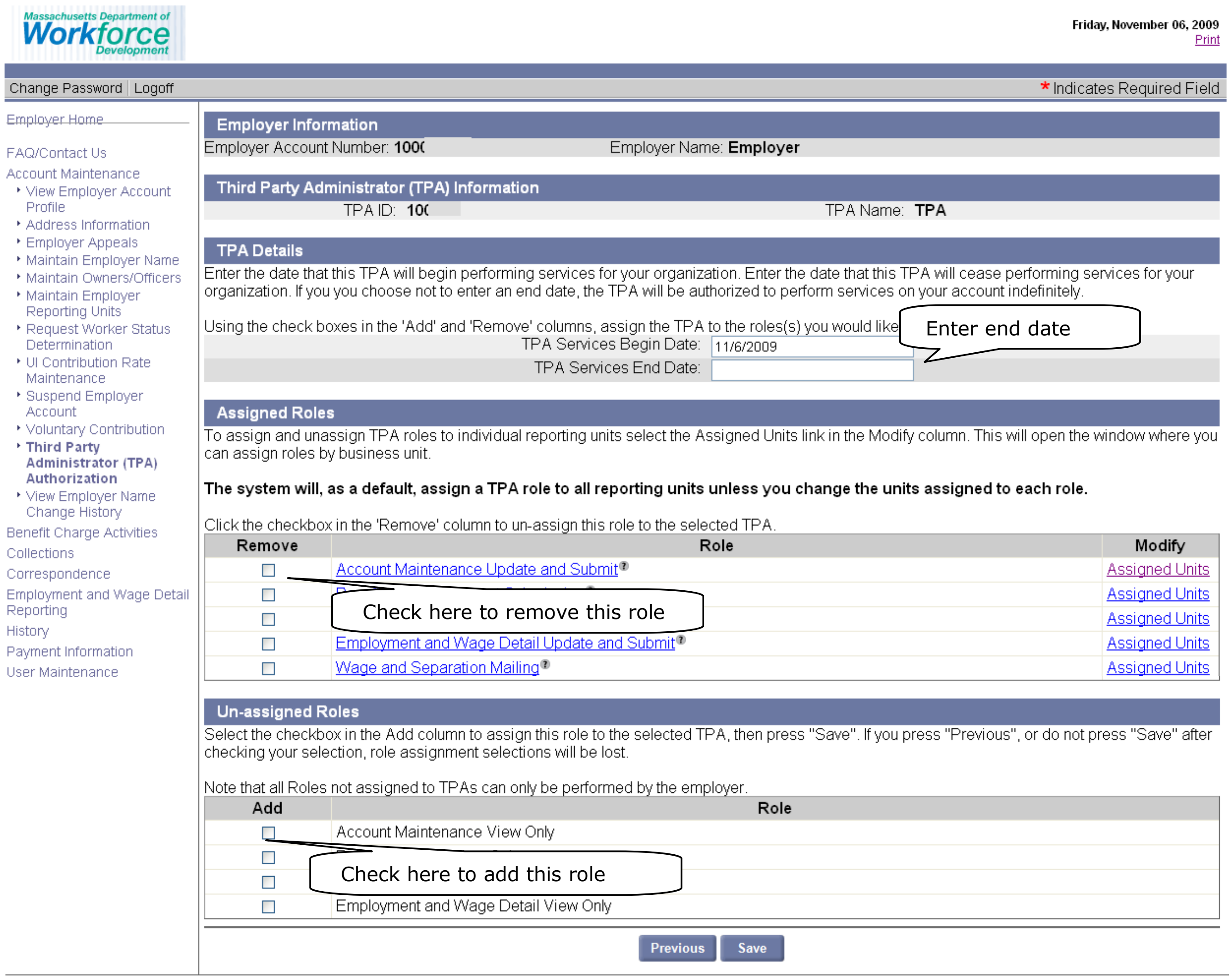
4. The following page will appear. If you wish to manage only existing role assignments to reporting units, click on 'Assigned Units' as shown below. Proceed to step 6 if you have to perform additional functions.



5. The following screen will appear. Add or remove reporting units to this specific role by using checkboxes. Click on 'Save'. The reporting units will now be assigned/unassigned.



6. Click on 'Modify' as shown in the screenshot from step 3. The following window will appear. If you wish to end the TPA association with your employer account, enter a date in the field 'TPA Services End Date'.


Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff

* Indicates Required Field

Employer Home

FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- Suspend Employer Account
- Voluntary Contribution
- **Third Party Administrator (TPA) Authorization**
- View Employer Name Change History

Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **100** Employer Name: **Employer**

Third Party Administrator (TPA) Information

TPA ID: **10** TPA Name: **TPA**

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the roles(s) you would like

Enter end date

TPA Services Begin Date: 11/6/2009
TPA Services End Date:

Assigned Roles

To assign and unassign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.

The system will, as a default, assign a TPA role to all reporting units unless you change the units assigned to each role.

Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

Remove	Role	Modify
☐	Account Maintenance Update and Submit	Assigned Units
☐		Assigned Units
☐		Assigned Units
☐	Employment and Wage Detail Update and Submit	Assigned Units
☐	Wage and Separation Mailing	Assigned Units

Check here to remove this role

Un-assigned Roles

Select the checkbox in the Add column to assign this role to the selected TPA, then press "Save". If you press "Previous", or do not press "Save" after checking your selection, role assignment selections will be lost.

Note that all Roles not assigned to TPAs can only be performed by the employer.

Add	Role
☐	Account Maintenance View Only
☐	
☐	
☐	Employment and Wage Detail View Only

Check here to add this role

Previous Save

7. If you wish to change role assignments to this TPA, use the checkboxes in columns 'Add' or 'Remove' as necessary (as shown in above screen).

8. Click 'Save' to update record with your changes.

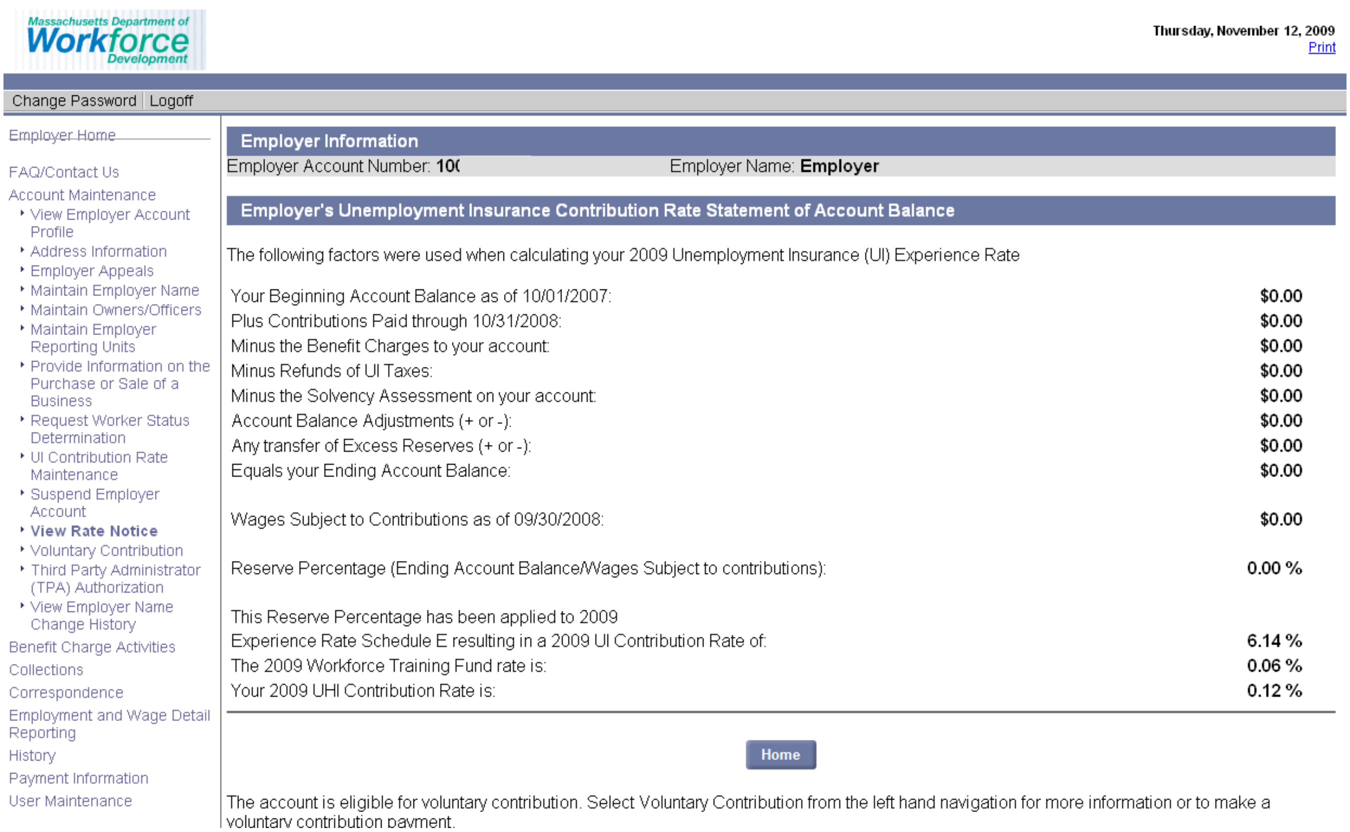
VIEW RATE NOTICE

Introduction	This section of the document will explain how an authorized user can view the current tax rate notice for an employer account.

Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the 'View Rate Notice' link from the list of available maintenance services. The following screen will appear with rate information.



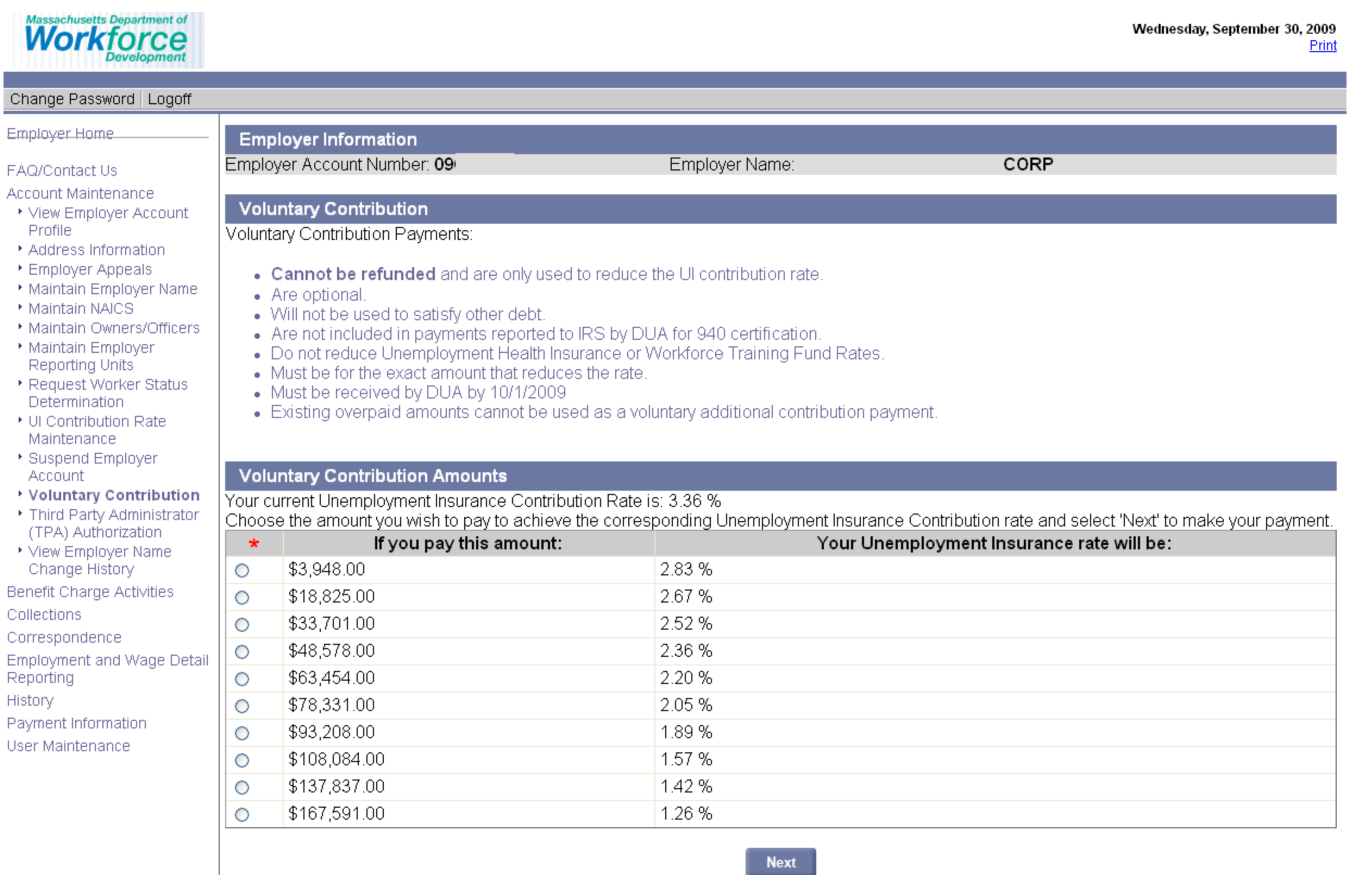
VOLUNTARY CONTRIBUTION

Introduction	This section of the document will show how an authorized user can make a voluntary contribution to buy down the tax rates. The Voluntary Contribution process will be available to eligible employers who can make UI contributions (payments) in advance and receive lower tax rates. The link to make a voluntary contribution will appear only if the employer is eligible and is within the voluntary contribution cut off date.

Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the link 'Voluntary Contribution'. The following page will appear with the suggested payments and corresponding 'would be' tax rates. Choose a payment amount and click 'Next' to continue.



Massachusetts Department of Workforce Development

Wednesday, September 30, 2009
Print

Change Password | Logoff

Employer Home
FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain NAICS
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- Suspend Employer Account
- **Voluntary Contribution**
- Third Party Administrator (TPA) Authorization
- View Employer Name Change History

Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **09** Employer Name: **CORP**

Voluntary Contribution

Voluntary Contribution Payments:

- **Cannot be refunded** and are only used to reduce the UI contribution rate.
- Are optional.
- Will not be used to satisfy other debt.
- Are not included in payments reported to IRS by DUA for 940 certification.
- Do not reduce Unemployment Health Insurance or Workforce Training Fund Rates.
- Must be for the exact amount that reduces the rate.
- Must be received by DUA by 10/1/2009
- Existing overpaid amounts cannot be used as a voluntary additional contribution payment.

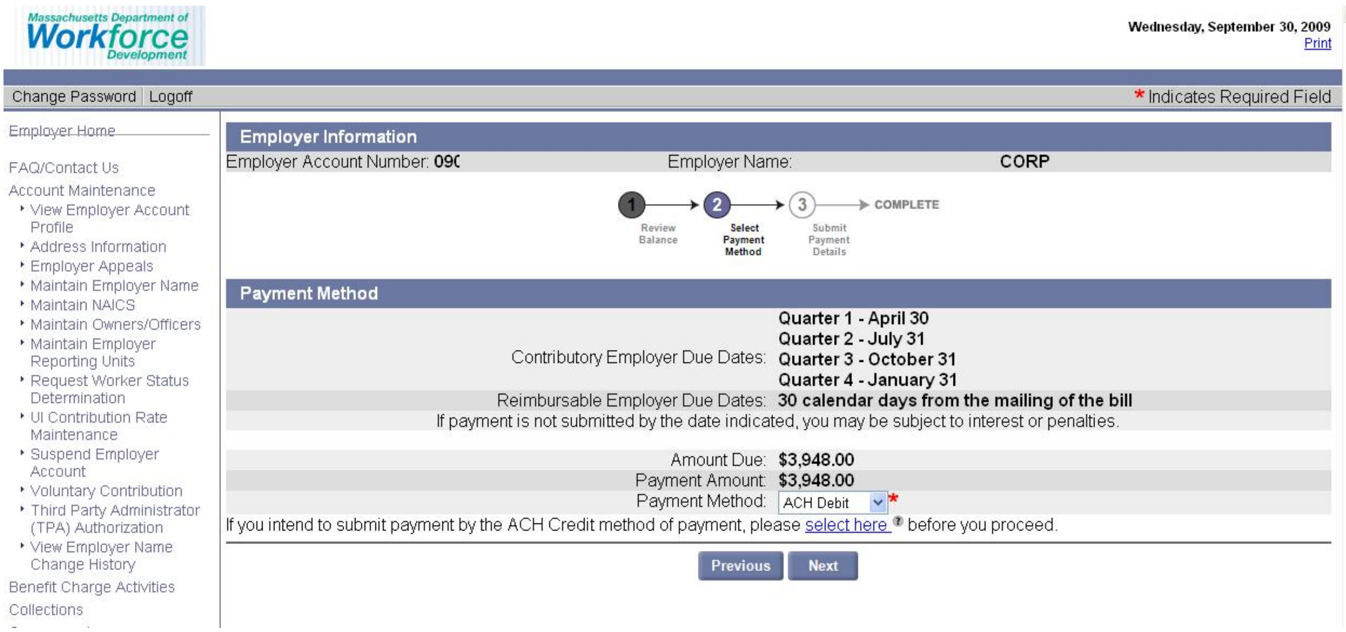
Voluntary Contribution Amounts

Your current Unemployment Insurance Contribution Rate is: 3.36 %
Choose the amount you wish to pay to achieve the corresponding Unemployment Insurance Contribution rate and select 'Next' to make your payment.

*	If you pay this amount:	Your Unemployment Insurance rate will be:
○	$3,948.00	2.83 %
○	$18,825.00	2.67 %
○	$33,701.00	2.52 %
○	$48,578.00	2.36 %
○	$63,454.00	2.20 %
○	$78,331.00	2.05 %
○	$93,208.00	1.89 %
○	$108,084.00	1.57 %
○	$137,837.00	1.42 %
○	$167,591.00	1.26 %

Next

3. The following page will appear from where you will be able to make the payment chosen in step 2. Click 'Next' to continue with the process.


Massachusetts Department of Workforce Development
Wednesday, September 30, 2009
Print
Change Password
Logoff
* Indicates Required Field
Employer Home
FAQ/Contact Us
Account Maintenance
View Employer Account Profile
Address Information
Employer Appeals
Maintain Employer Name
Maintain NAICS
Maintain Owners/Officers
Maintain Employer Reporting Units
Request Worker Status Determination
UI Contribution Rate Maintenance
Suspend Employer Account
Voluntary Contribution
Third Party Administrator (TPA) Authorization
View Employer Name Change History
Benefit Charge Activities
Collections
Employer Information
Employer Account Number: 090
Employer Name:
CORP
Review Balance
Select Payment Method
Submit Payment Details
COMPLETE
Payment Method
Contributory Employer Due Dates:
Quarter 1 - April 30
Quarter 2 - July 31
Quarter 3 - October 31
Quarter 4 - January 31
Reimbursable Employer Due Dates: 30 calendar days from the mailing of the bill
If payment is not submitted by the date indicated, you may be subject to interest or penalties.
Amount Due: $3,948.00
Payment Amount: $3,948.00
Payment Method: ACH Debit *
If you intend to submit payment by the ACH Credit method of payment, please select here before you proceed.
Previous
Next

PROVIDE INFORMATION ON THE PURCHASE OR SALE OF A BUSINESS

Introduction	Experience transfers are initiated by the purchase or sale or change of legal entity type of all or part of a business. The system will determine ownership type, common or non-common, and the type of transfer, full or partial, and will make a determination on the transfer. New tax rates will then be assigned for your account. This section of the document will explain how an authorized user can provide information on the sale or purchase of a business. The system allows you to enter up to five different reasons to initiate an experience transfer and the information you are required to provide will vary according to the reason.

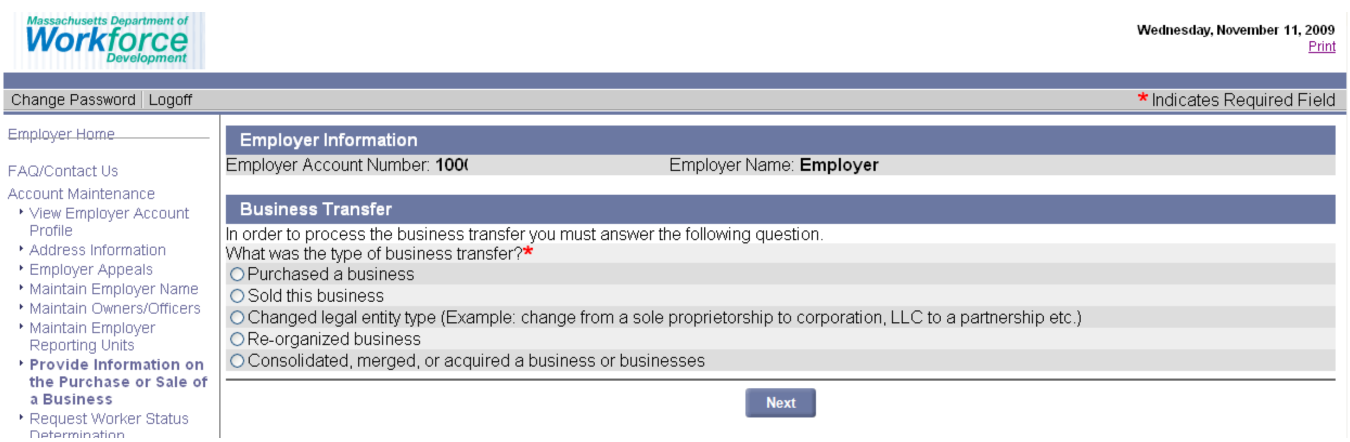
Step-by-Step Instructions:

Purchased a Business/ Re-organized Business/Consolidated, merged or acquired a business.

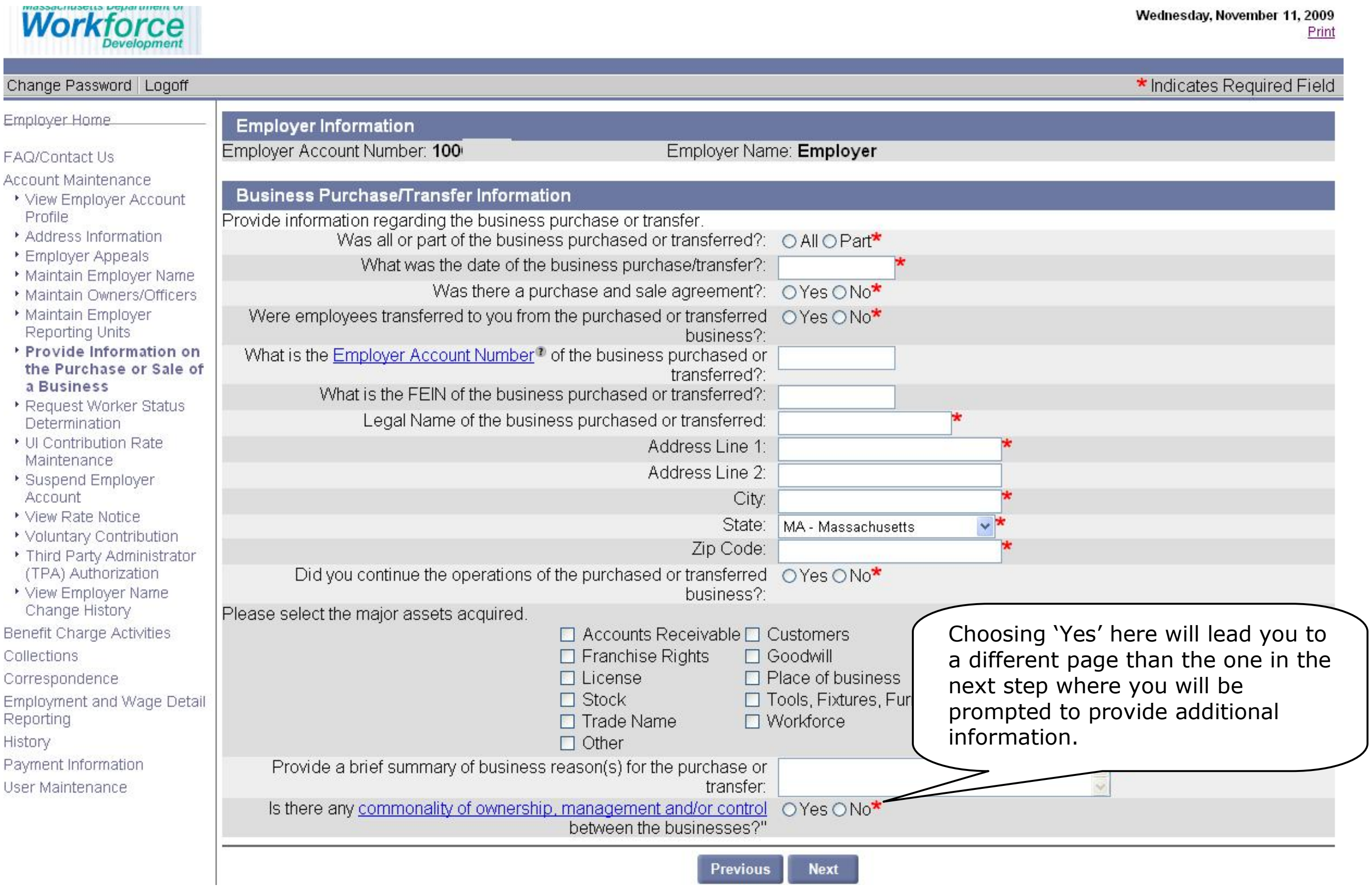
The instructions below are applicable if you 1. Purchased a Business, 2. Re-organized Business or 3. Consolidated, merged or acquired a Business.

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

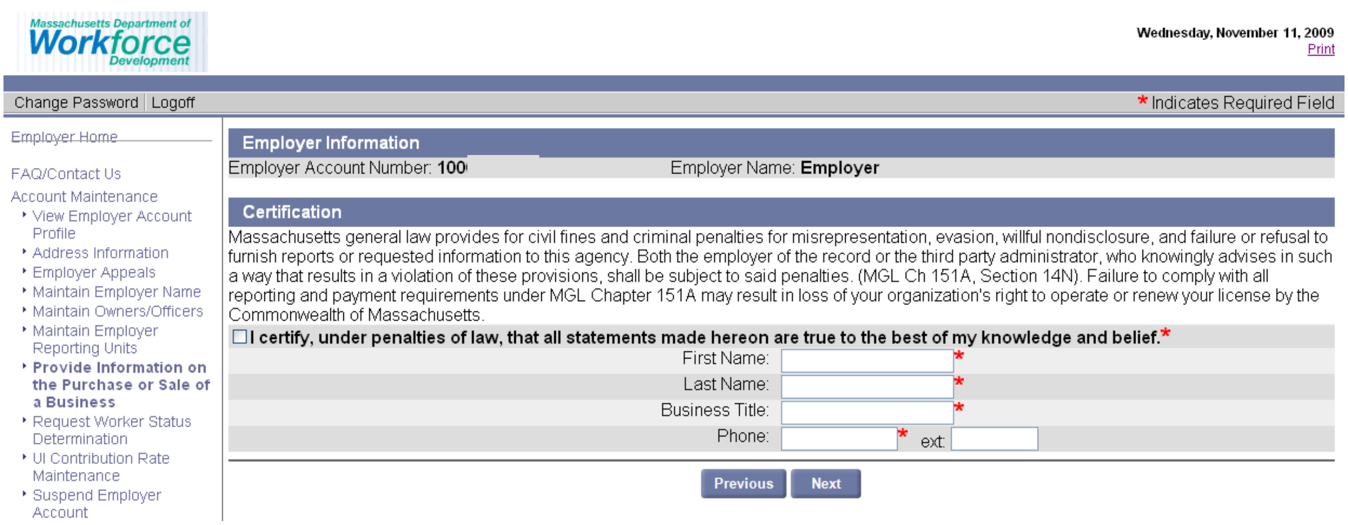
2. Click on the link 'Provide Information on the Purchase or Sale of a Business'. The following page will appear. Choose the reason for the change using the radio buttons and click 'Next'.



3. The following page will appear. Enter the requested information and click 'Next' to continue with the process.



4. The following page will appear where you will be prompted to certify the information provided so far. Use the checkbox to certify and click 'Next' to proceed.



5. The following page will appear where you will be presented with the option to add a different sale/purchase information. If you do not have anything to add, click 'Submit' to continue.


Massachusetts Department of Workforce Development

Wednesday, November 11, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us

Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- **Provide Information on the Purchase or Sale of a Business**

Employer Information

Employer Account Number: **100** Employer Name: **Employer**

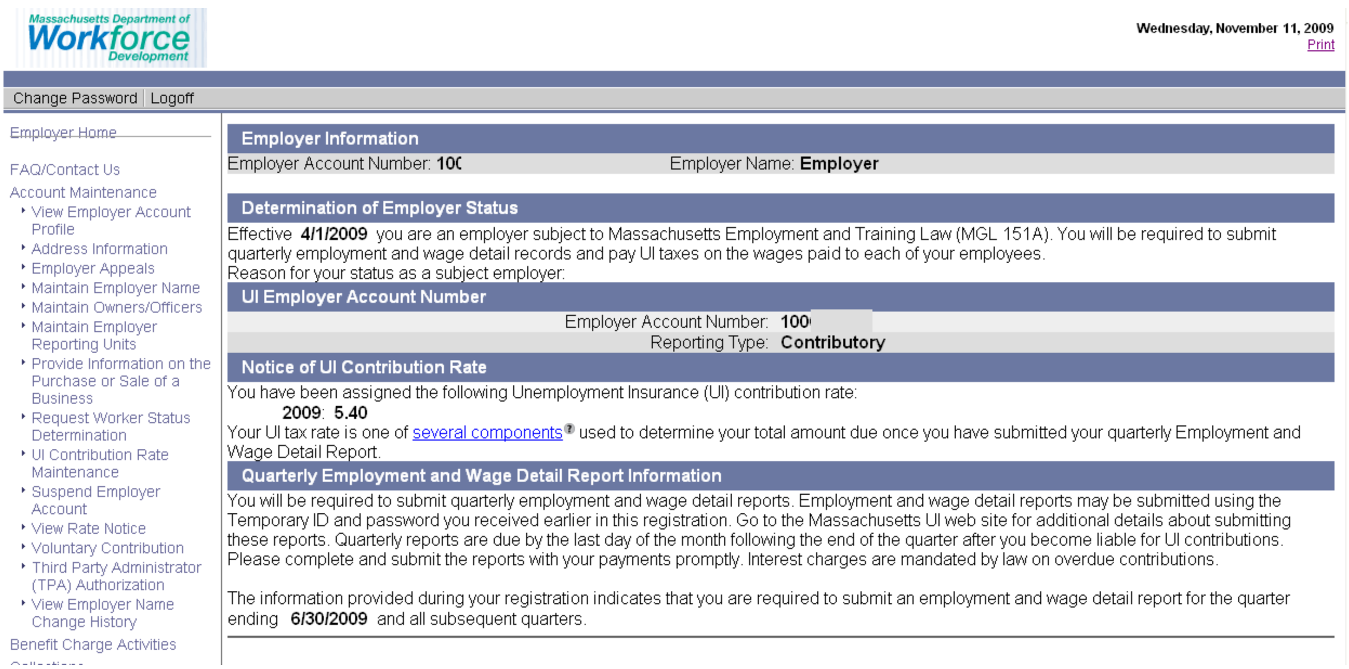
Business Purchase

FEIN	Name	Effective Date
26-	xxxx	9/1/2009

Select 'Add' to add another business to the list. If you have entered all of the businesses involved in the transaction select 'Submit'.

Previous | Add | Submit

6. The following page will appear with your newly assigned tax rates, calculated by the system based on the information you provided on the recent purchase of a business.


Massachusetts Department of Workforce Development

Wednesday, November 11, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us

Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Provide Information on the Purchase or Sale of a Business
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- Suspend Employer Account
- View Rate Notice
- Voluntary Contribution
- Third Party Administrator (TPA) Authorization
- View Employer Name Change History

Benefit Charge Activities

Employer Information

Employer Account Number: **10(** Employer Name: **Employer**

Determination of Employer Status

Effective **4/1/2009** you are an employer subject to Massachusetts Employment and Training Law (MGL 151A). You will be required to submit quarterly employment and wage detail records and pay UI taxes on the wages paid to each of your employees.
Reason for your status as a subject employer:

UI Employer Account Number

Employer Account Number: **100**
Reporting Type: **Contributory**

Notice of UI Contribution Rate

You have been assigned the following Unemployment Insurance (UI) contribution rate:
2009: **5.40**
Your UI tax rate is one of several components used to determine your total amount due once you have submitted your quarterly Employment and Wage Detail Report.

Quarterly Employment and Wage Detail Report Information

You will be required to submit quarterly employment and wage detail reports. Employment and wage detail reports may be submitted using the Temporary ID and password you received earlier in this registration. Go to the Massachusetts UI web site for additional details about submitting these reports. Quarterly reports are due by the last day of the month following the end of the quarter after you become liable for UI contributions. Please complete and submit the reports with your payments promptly. Interest charges are mandated by law on overdue contributions.

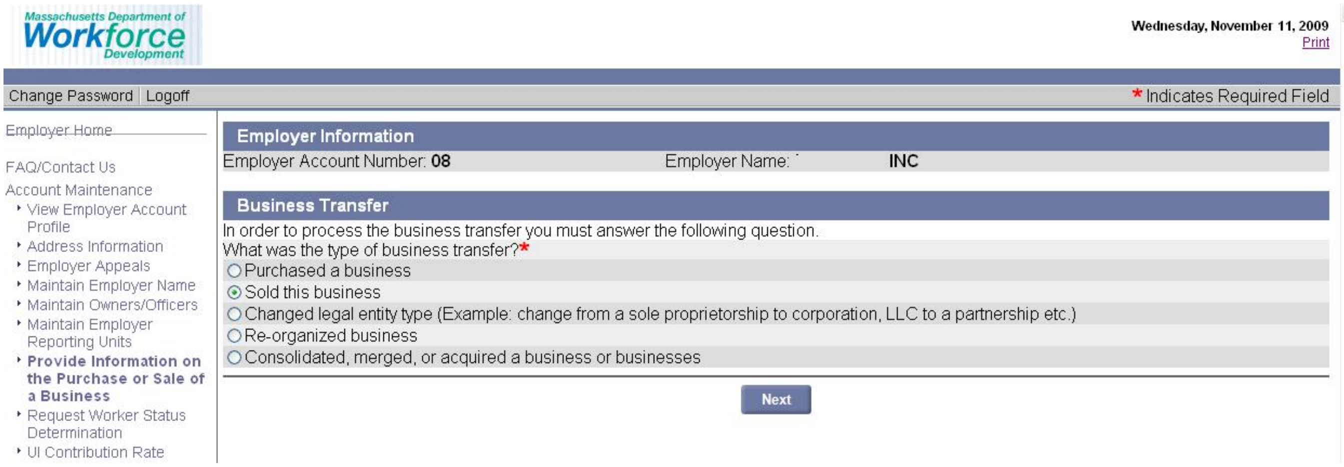
The information provided during your registration indicates that you are required to submit an employment and wage detail report for the quarter ending **6/30/2009** and all subsequent quarters.

Sale of a Business:

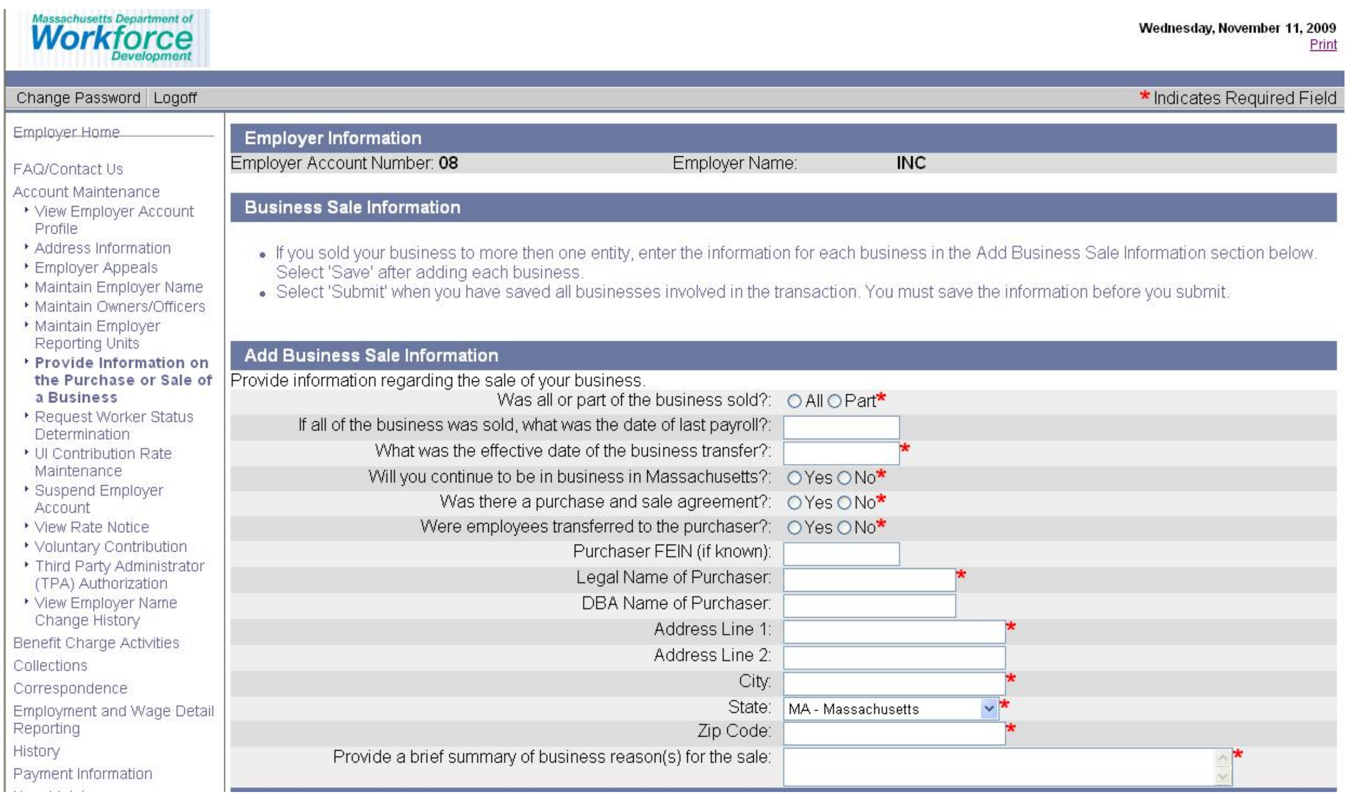
The instructions below are applicable if you have sold your business.

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

2. Click on the link 'Provide Information on the Purchase or Sale of a Business'. The following page will appear. Choose the reason for business transfer as 'Sold this Business' using the radio buttons and click 'Next'.



3. The following page will appear where you will be prompted to provide information on the sale of your business. Once you have provided all the required information, click on 'Submit'.



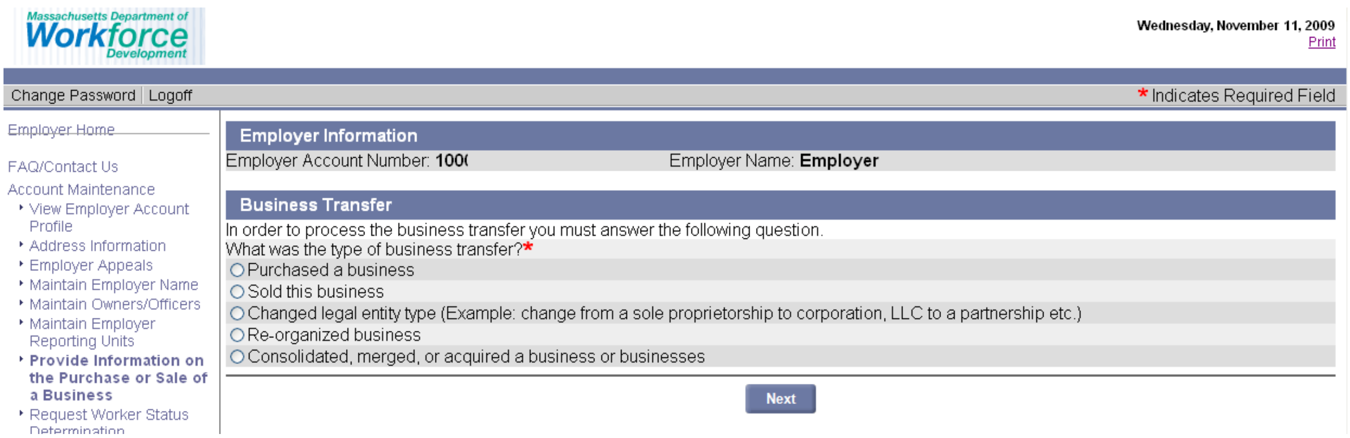
4. The following page will appear indicating that the process is complete. You will also be presented with a link which you can use to suspend your account. Please refer to the section on 'Suspend Employer Account' for instructions to suspend your account.

Changed Legal Entity:

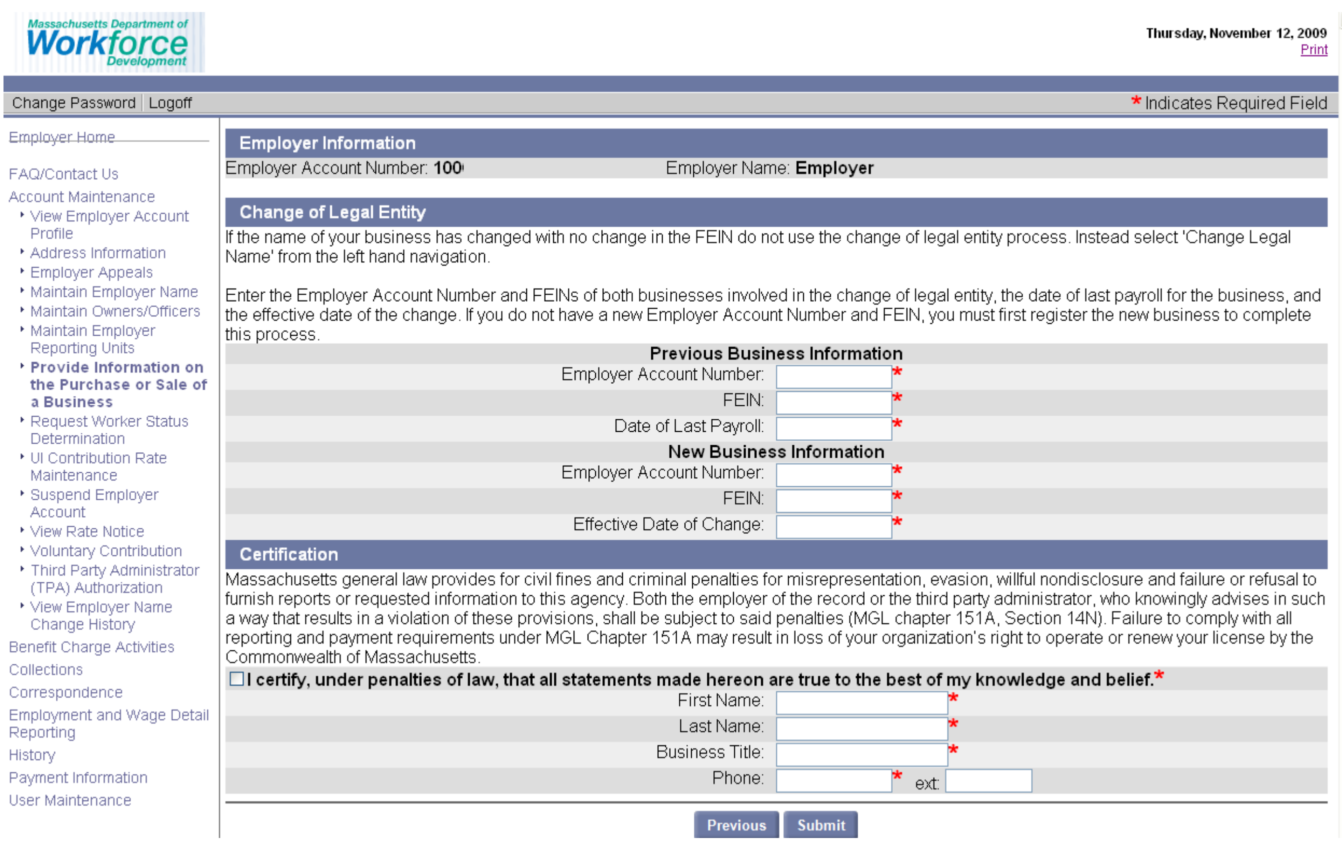
The instructions below are applicable if you have changed the legal entity type of your business.

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.

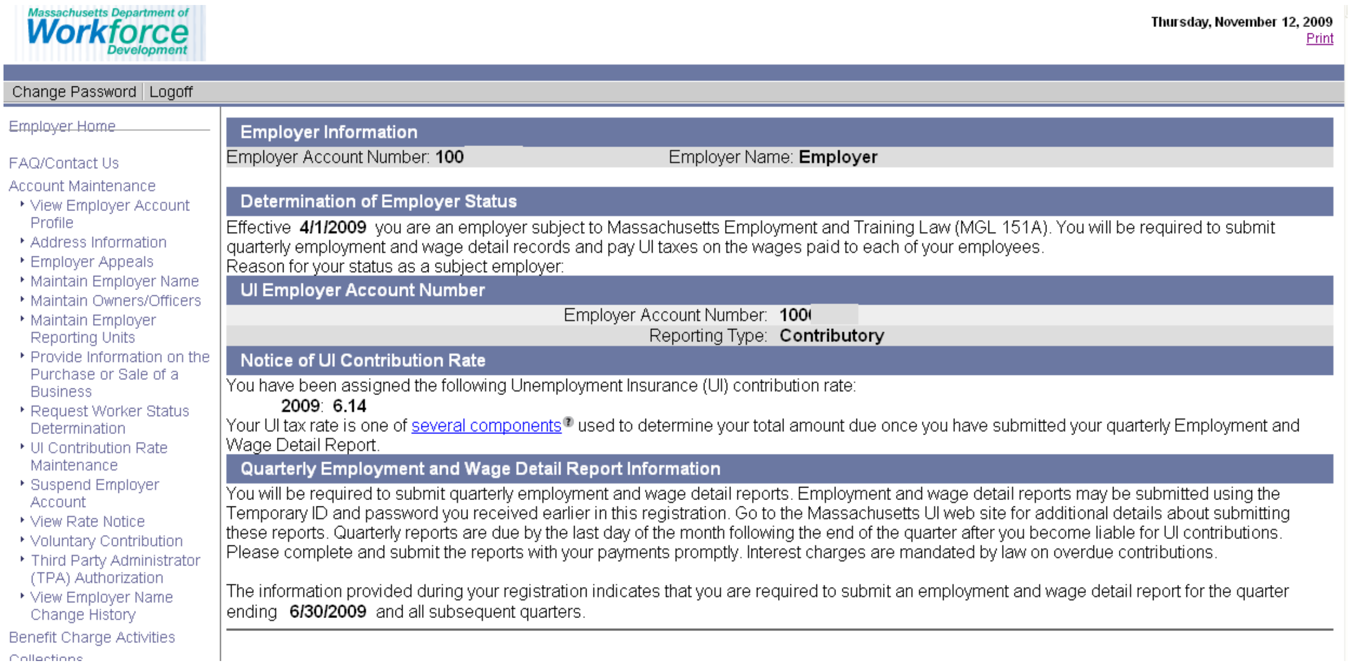
2. Click on the link 'Provide Information on the Purchase or Sale of a Business'. The following page will appear. Choose the reason for business transfer as 'Changed Legal Entity' and click 'Next'.



3. The following page will appear. Enter the requested information and click 'Next' to continue.



4. The following page will appear with your new tax rates as a result of the change.



Massachusetts Department of Workforce Development

Thursday, November 12, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Provide Information on the Purchase or Sale of a Business
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- Suspend Employer Account
- View Rate Notice
- Voluntary Contribution
- Third Party Administrator (TPA) Authorization
- View Employer Name Change History

Benefit Charge Activities
Collections

Employer Information

Employer Account Number: **100** Employer Name: **Employer**

Determination of Employer Status

Effective **4/1/2009** you are an employer subject to Massachusetts Employment and Training Law (MGL 151A). You will be required to submit quarterly employment and wage detail records and pay UI taxes on the wages paid to each of your employees.
Reason for your status as a subject employer:

UI Employer Account Number

Employer Account Number: **100**
Reporting Type: **Contributory**

Notice of UI Contribution Rate

You have been assigned the following Unemployment Insurance (UI) contribution rate:
2009: **6.14**
Your UI tax rate is one of several components used to determine your total amount due once you have submitted your quarterly Employment and Wage Detail Report.

Quarterly Employment and Wage Detail Report Information

You will be required to submit quarterly employment and wage detail reports. Employment and wage detail reports may be submitted using the Temporary ID and password you received earlier in this registration. Go to the Massachusetts UI web site for additional details about submitting these reports. Quarterly reports are due by the last day of the month following the end of the quarter after you become liable for UI contributions. Please complete and submit the reports with your payments promptly. Interest charges are mandated by law on overdue contributions.

The information provided during your registration indicates that you are required to submit an employment and wage detail report for the quarter ending **6/30/2009** and all subsequent quarters.

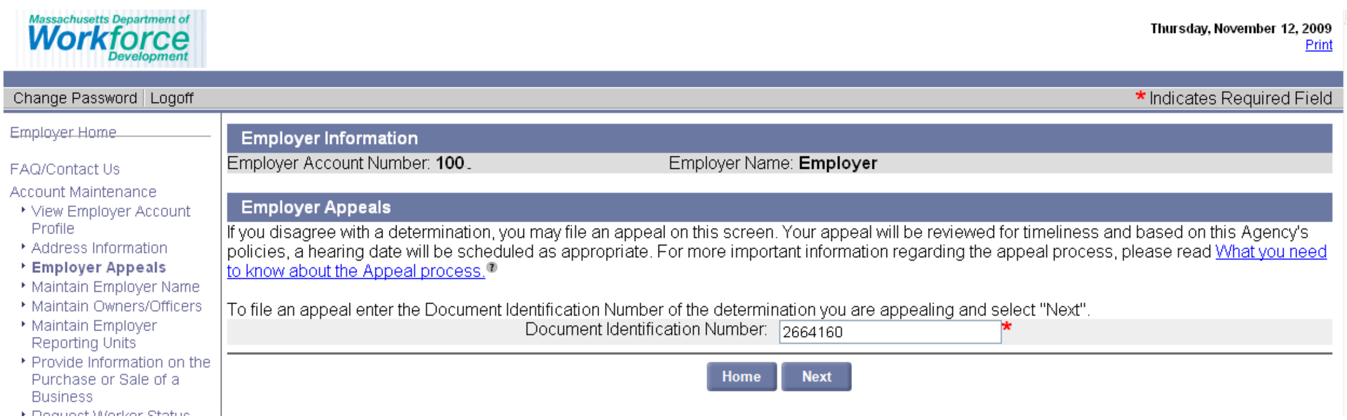
EMPLOYER APPEALS

Introduction	This section of the document will show how an authorized user can file an appeal against a Determination on an employer account. The document ID (from QUEST) of the Determination will be required to begin the process. Upon submission of your appeal, DUA staff will review your appeal. If your appeal is timely, staff may choose to forward the Appeal to the Hearings department or perform account resolution without forwarding the Appeal to the Hearings Department.

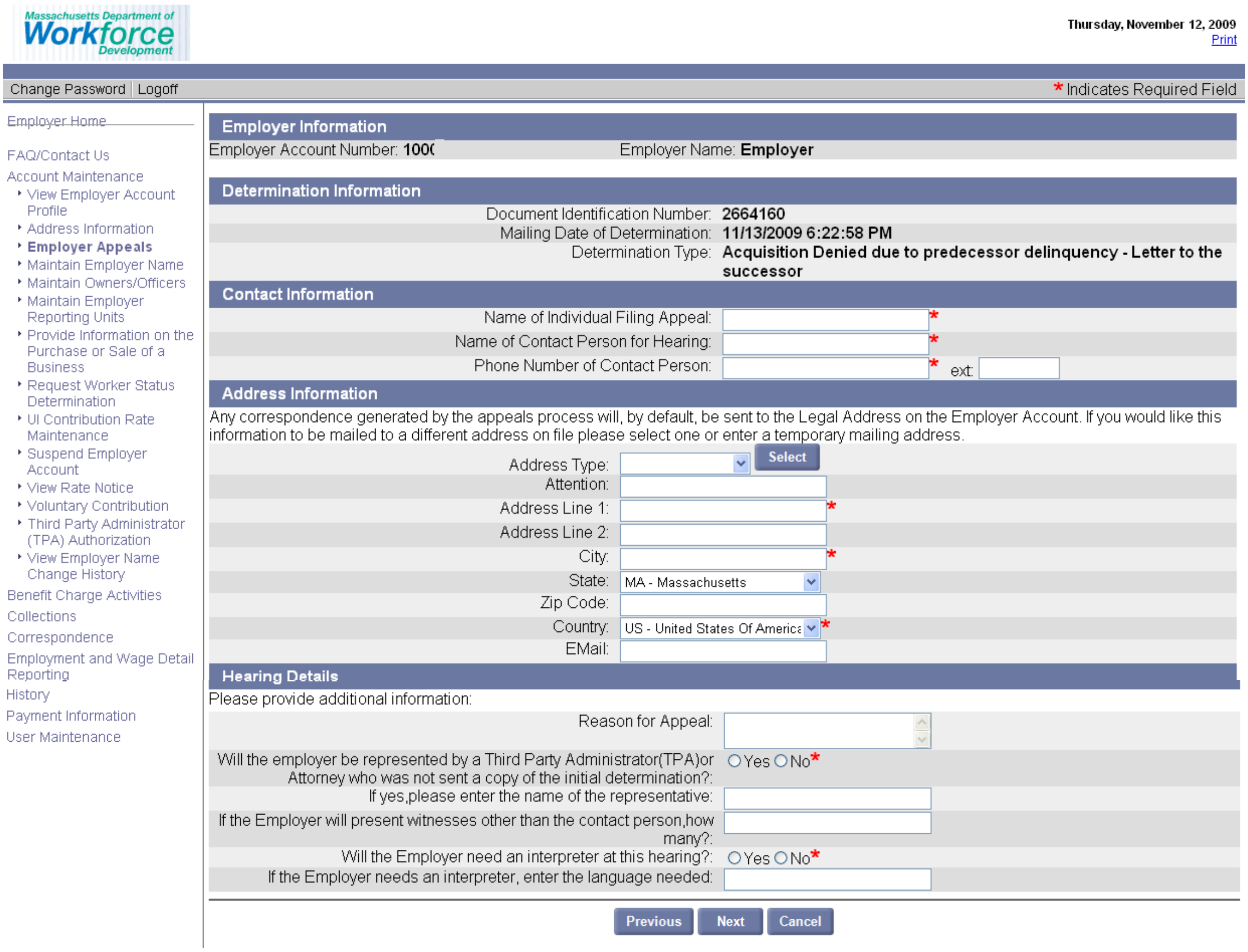
Step-by-Step Instructions:

1. Navigate to the account maintenance splash page for the employer who is filing the appeal. If required, refer to the section on 'Account Maintenance' for navigation.

2. Click on 'Employer Appeals'. The following screen will appear. Enter the document ID from the Determination correspondence.

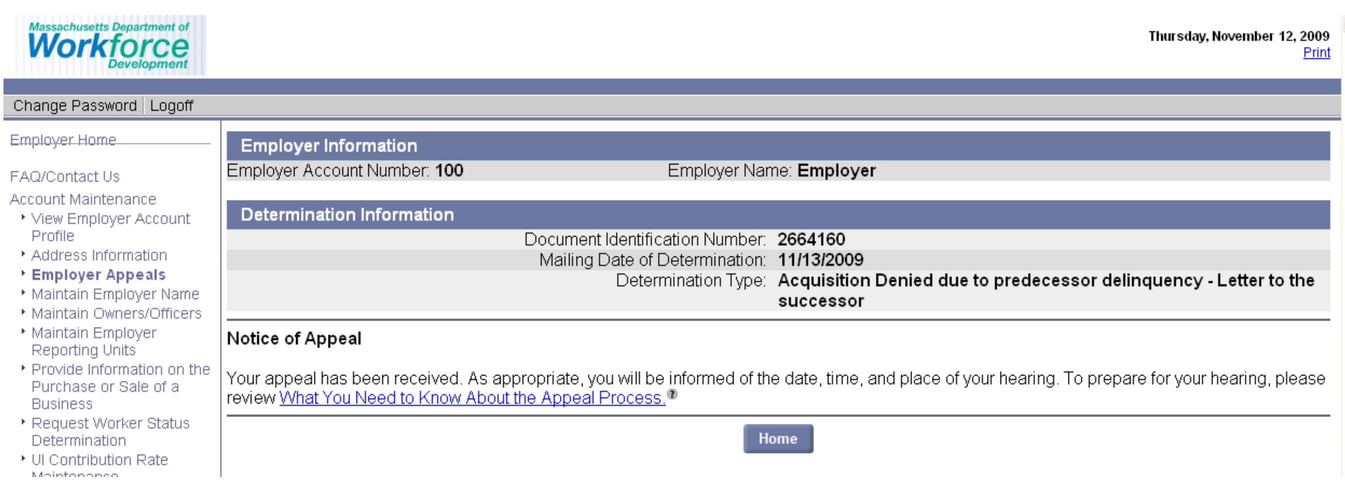


3. Click 'Next'. The following screen will appear. Enter the information required to complete the appeal.



4. Click 'Next'. You will be asked to review the appeal details for confirmation. Confirm by clicking 'Submit'.

5. The following page will appear indicating that the filing is complete.

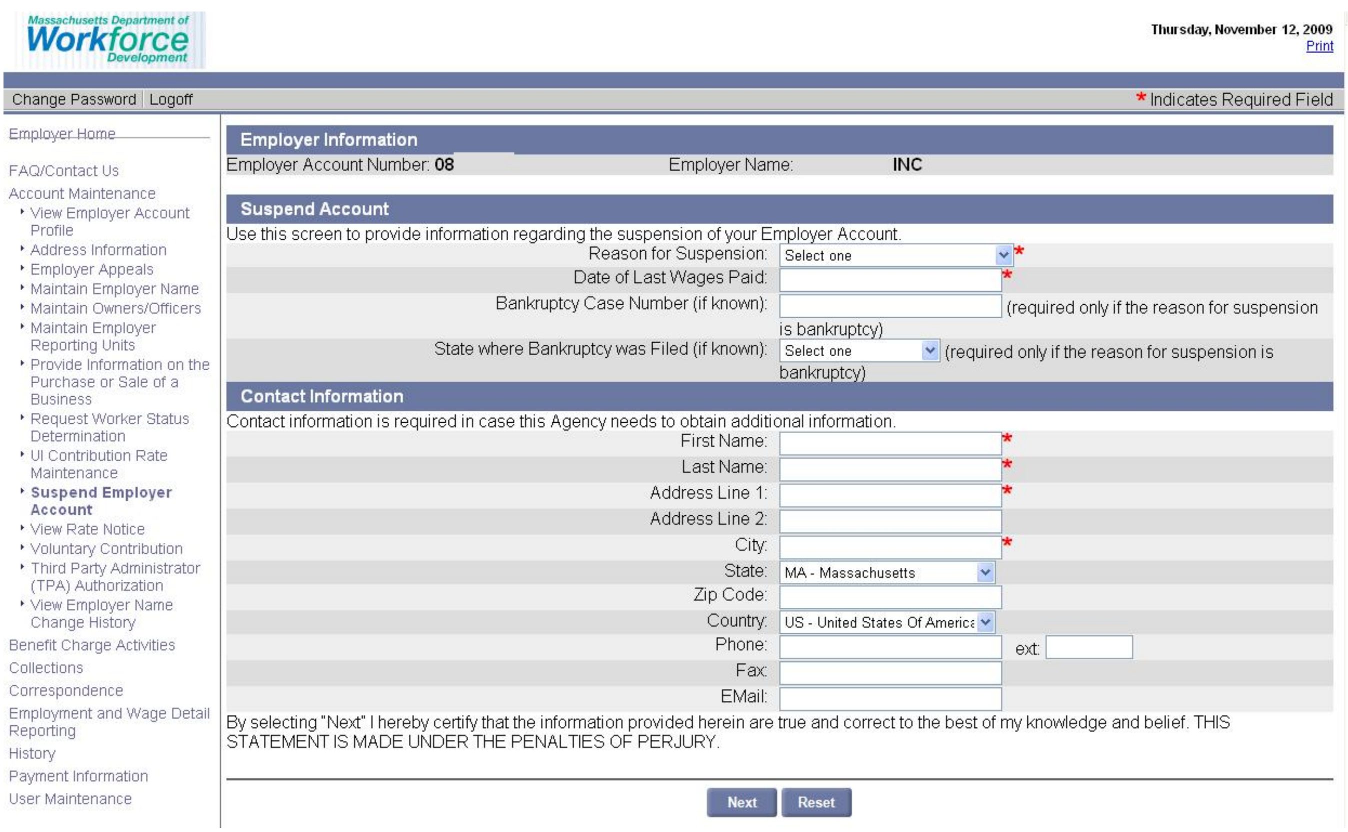


SUSPEND EMPLOYER ACCOUNT

Introduction	This section of the document will explain how an authorized user can request for an employer account suspension. The employer account suspension can occur with or without DUA approval/intervention. If the reason for your request is permanent closure of business and if your account meets certain criteria, the system will suspend the account immediately. In other cases, the request must be reviewed by authorized DUA staff to approve or deny the suspension.

Step-by-Step Instructions:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Suspend Employer Account' link from the list of available maintenance functions. The screen shown below will appear. Enter the reason for suspension and other requested information. Click 'Next' to continue.



3. If the reason for suspension is anything other than 'Permanently discontinued', you will be asked to provide additional information before the certification step. Otherwise, you will be asked to certify your suspension request.

4. Click on 'Submit' to certify your request.

Massachusetts Department of Workforce Development

Thursday, November 12, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Provide Information on the Purchase or Sale of a Business
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- **Suspend Employer Account**
- View Rate Notice
- Voluntary Contribution
- Third Party Administrator (TPA) Authorization

Employer Information

Employer Account Number: **08** Employer Name: **INC**

Suspend Account Summary

If the following information is correct, select "Submit" or select "Previous" to make any necessary changes.

Reason for Suspension:	**Permanently discontinued**
Date of Last Wages Paid:	**10/1/2009**
Bankruptcy Case Number:	
State where Bankruptcy was Filed:	

Contact Information

First Name:	**J**
Last Name:	**J**
Address:	**xxxx** **Boston, MA 02114** **United States Of America**
EMail:	

By selecting "Submit" I hereby certify that the information provided herein are true and correct to the best of my knowledge and belief. THIS STATEMENT IS MADE UNDER THE PENALTIES OF PERJURY.

Previous | Submit

5. A confirmation of your request will be displayed.

Massachusetts Department of Workforce Development

Thursday, November 12, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
- View Employer Account Profile
- Address Information
- Employer Appeals
- Maintain Employer Name
- Maintain Owners/Officers
- Maintain Employer Reporting Units
- Provide Information on the Purchase or Sale of a Business
- Request Worker Status Determination
- UI Contribution Rate Maintenance
- **Suspend Employer Account**
- View Rate Notice
- Voluntary Contribution
- Third Party Administrator (TPA) Authorization
- View Employer Name

Employer Information

Employer Account Number: **08** Employer Name: **INC**

IMPORTANT: Read instructions here.

Confirmation of Suspension of Account

The Massachusetts UI Program records indicate that you suspended your UI account effective 10/1/2009

REPORTING REQUIREMENTS FOR SUSPENDED ACCOUNTS

You are responsible for filing quarterly employment and wage detail reports for all quarters in which you pay wages to any person working or living in Massachusetts. These reports are due on the last day of the month following the end of the calendar quarter.
If suspended mid-quarter and no continuing monies are to be reported to Department of Revenue (DOR), you may submit the employment and wage detail immediately after the effective suspension date.
Interest is assessed for any payments that are paid after the due date. To avoid assessment of interest, please submit your employment and wage detail reports on a timely basis until the suspension date, even if there are no wages to report.

REVIVAL OF ACCOUNT

If you resume operations again under the same legal entity, and again pay wages, you must reinstate your UI account. For information regarding revival with the Massachusetts UI Program, please refer to www.mass.gov

DEBT FOLLOWING SUSPENSION

If this account has unpaid debt, that debt must be paid even though the account has been suspended. Interest will accrue until the debt has been paid.

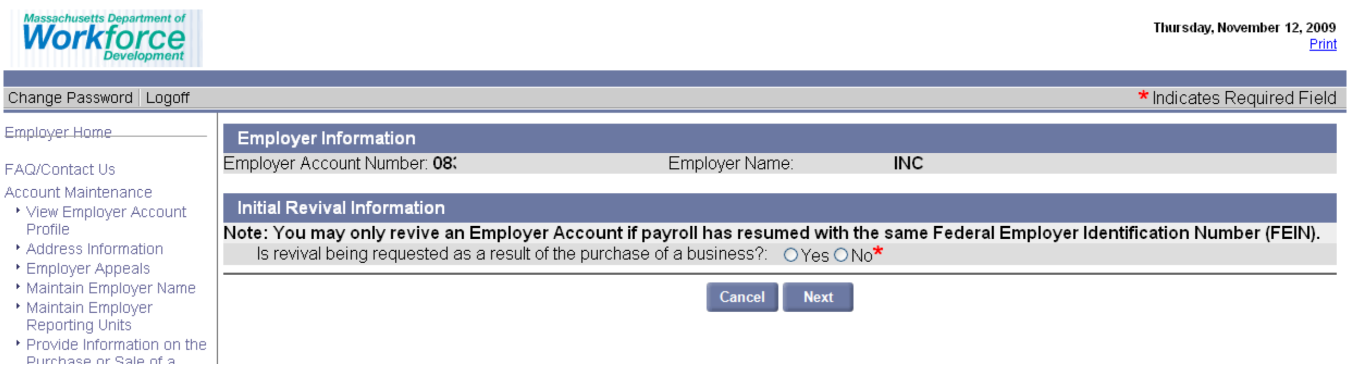
REVIVE EMPLOYER ACCOUNT

Introduction	This section of the document will explain how an authorized user can revive an employer account. The employer account can be revived from a state of suspension, when an employer elects to revive their account. Upon revival, tax rates will be calculated based on experience factors from the previously suspended account. If Revival request is due to purchase of a business, you will be prompted to complete the process – 'Provide Information on the Purchase or Sale of a Business'.

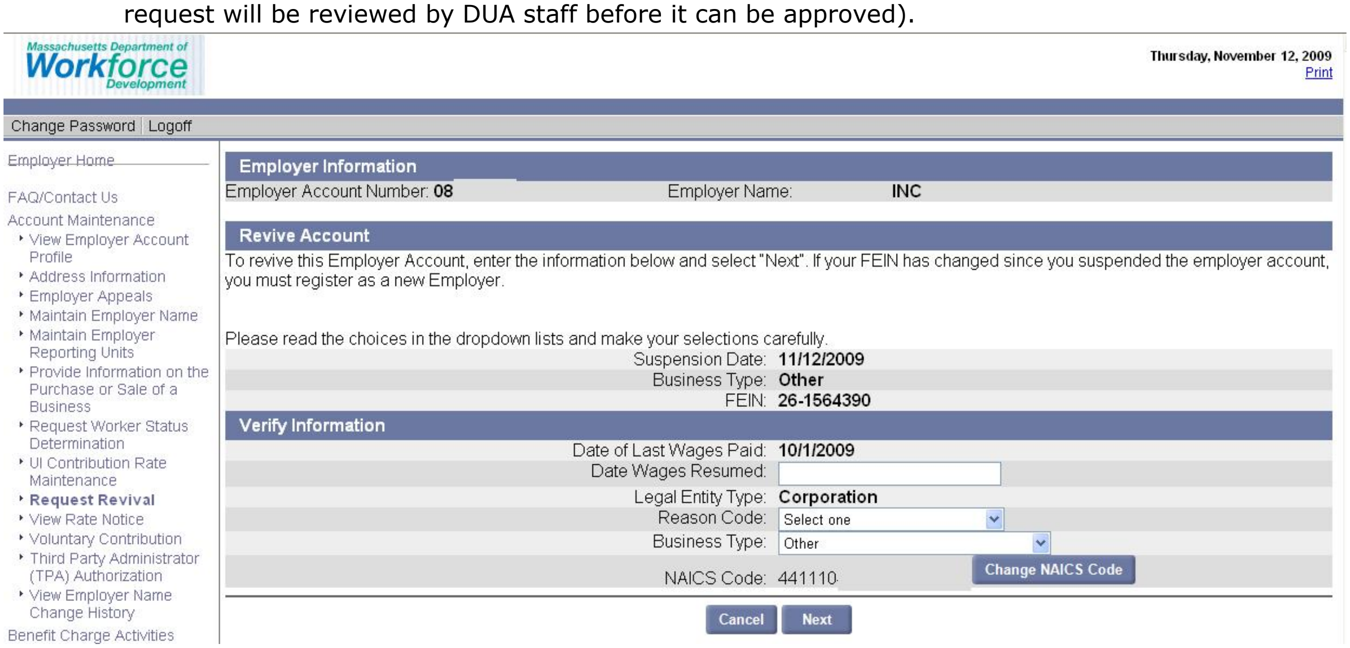
Step-by-Step Instructions:

1. Navigate to the 'Account Maintenance' splash page. If required, please refer to 'Navigating to Account Maintenance' section of this document.

2. Click on the 'Request Revival' link from the list of available maintenance services. The screen shown below will appear. Click 'Next' to continue.



3. The screen shown below will appear. Enter the information necessary to revive the account. If the NAICS code or business type has changed, provide it here. (In such cases, your account revival request will be reviewed by DUA staff before it can be approved).



4. Click 'Next'. You will be asked to confirm the changes. Upon confirmation, you will see a notice of revival, displaying your UI tax rates and other relevant information.

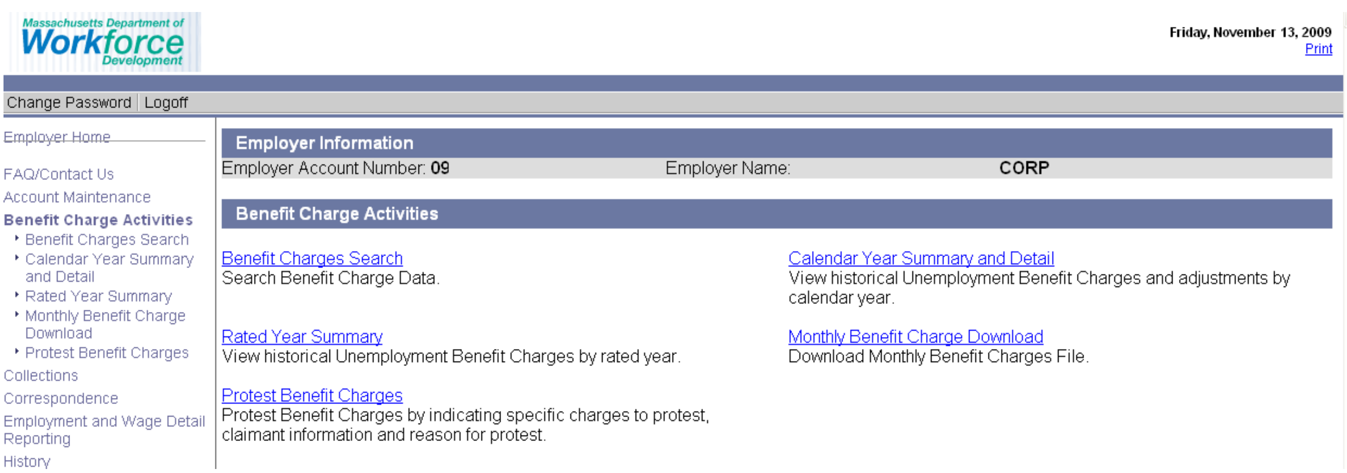
BENEFIT CHARGES

Introduction	This section of the document will show how an authorized user can search and view benefit charges on the employer account. It will also be shown how the employer can file a protest against benefit charges. When a protest is filed, the DUA staff will review the protest to provide resolution. The user can view the benefit charges using the following links/methods and each of this method provides a unique view of the Benefit charges. 1) Benefit Charges Search 2) Calendar Year Summary and Detail 3) Rated Year Summary 4) Monthly Benefit Charge Download. Please refer to the step by step instructions for more information on each view.

Step-by-Step Instructions:

Navigating to Benefit Charges home page:

Click on the link ‘ Benefit Charges Activities’ while logged into the employer home page. The following page will appear. Click on the corresponding link to access a benefit charges function.



Benefit Charges Search:

This function allows the user to search for benefit charges data by the individual claimant name/SSN. The user also has the option to limit the search results to calendar year or rated year.

1. Follow the steps outlined in the section ‘Navigating to Benefit Charges home page’. Click on the link ‘Benefit Charges Search’.

2. The following page will appear. Enter your search criteria and click on ‘Search’ to view the search results.

3. The search results will appear as shown below.

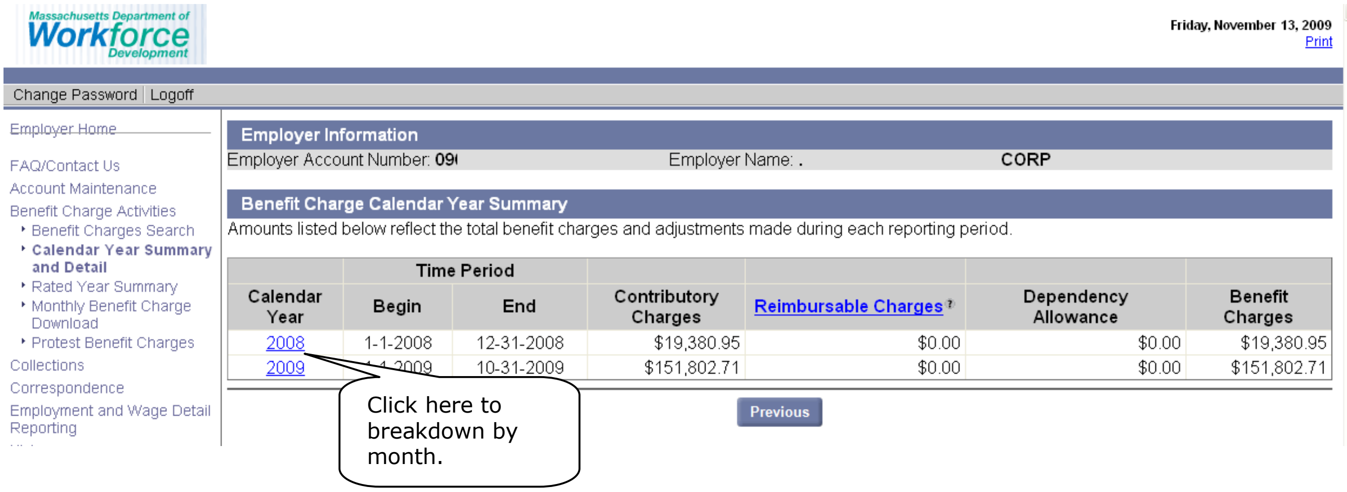
4. Clicking on the SSN will provide the individual claimant's account summary/detail.

Calendar Year Summary and Detail:

This function allows the user to view historical Unemployment Benefit Charges and adjustments by calendar year.

1. Follow the steps outlined in the section 'Navigating to Benefit Charges home page'. Click on the link 'Calendar Year Summary and Detail'.

2. The following page will appear. Amounts listed on the page, reflect the total benefit charges and adjustments made during each reporting period.



Friday, November 13, 2009
Print

Change Password | Logoff

Employer Home
FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
- Benefit Charges Search
- **Calendar Year Summary and Detail**
- Rated Year Summary
- Monthly Benefit Charge Download
- Protest Benefit Charges

Collections
Correspondence
Employment and Wage Detail Reporting

Employer Information

Employer Account Number: 09 Employer Name: . CORP

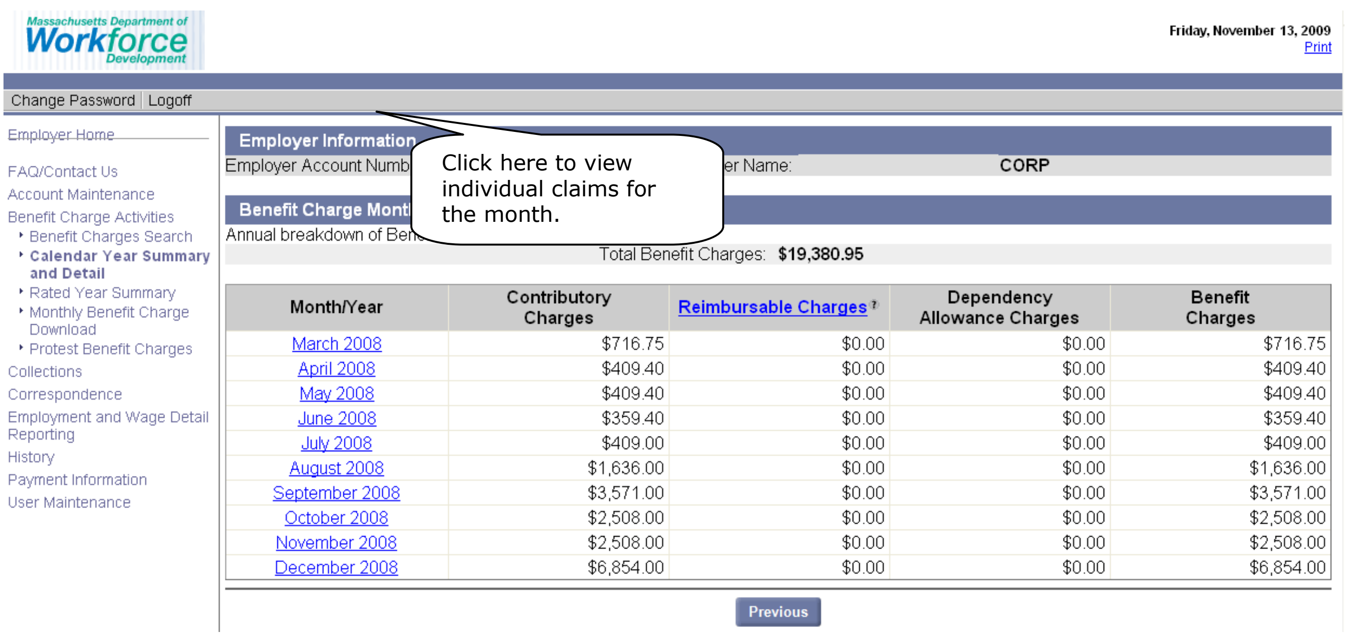
Benefit Charge Calendar Year Summary

Amounts listed below reflect the total benefit charges and adjustments made during each reporting period.

Calendar Year	Time Period Begin	Time Period End	Contributory Charges	Reimbursable Charges	Dependency Allowance	Benefit Charges
2008	1-1-2008	12-31-2008	$19,380.95	$0.00	$0.00	$19,380.95
2009	1-1-2009	10-31-2009	$151,802.71	$0.00	$0.00	$151,802.71

Previous

3. The breakdown by month will appear as shown below.



Friday, November 13, 2009
Print

Change Password | Logoff

Employer Home
FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
- Benefit Charges Search
- **Calendar Year Summary and Detail**
- Rated Year Summary
- Monthly Benefit Charge Download
- Protest Benefit Charges

Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information

Employer Account Numb ... er Name: CORP

Benefit Charge Mont...

Annual breakdown of Ben...

Total Benefit Charges: **$19,380.95**

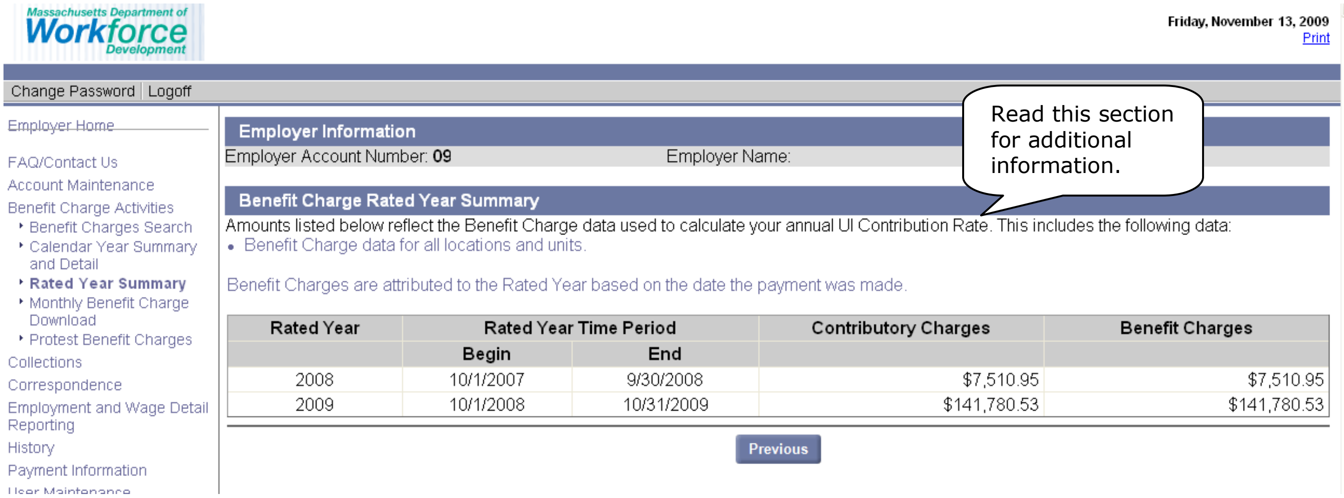
Month/Year	Contributory Charges	Reimbursable Charges	Dependency Allowance Charges	Benefit Charges
March 2008	$716.75	$0.00	$0.00	$716.75
April 2008	$409.40	$0.00	$0.00	$409.40
May 2008	$409.40	$0.00	$0.00	$409.40
June 2008	$359.40	$0.00	$0.00	$359.40
July 2008	$409.00	$0.00	$0.00	$409.00
August 2008	$1,636.00	$0.00	$0.00	$1,636.00
September 2008	$3,571.00	$0.00	$0.00	$3,571.00
October 2008	$2,508.00	$0.00	$0.00	$2,508.00
November 2008	$2,508.00	$0.00	$0.00	$2,508.00
December 2008	$6,854.00	$0.00	$0.00	$6,854.00

Previous

Rated Year Summary:

This function allows the user to view historical Unemployment Benefit Charges by rated year.

1. Follow the steps outlined in the section 'Navigating to Benefit Charges home page'.
2. Click on the link, 'Rated Year Summary'. The following page will appear listing the benefit charges by rated year.



Monthly Benefit Charge Download:

This function allows the user to download benefit charges detail by month.

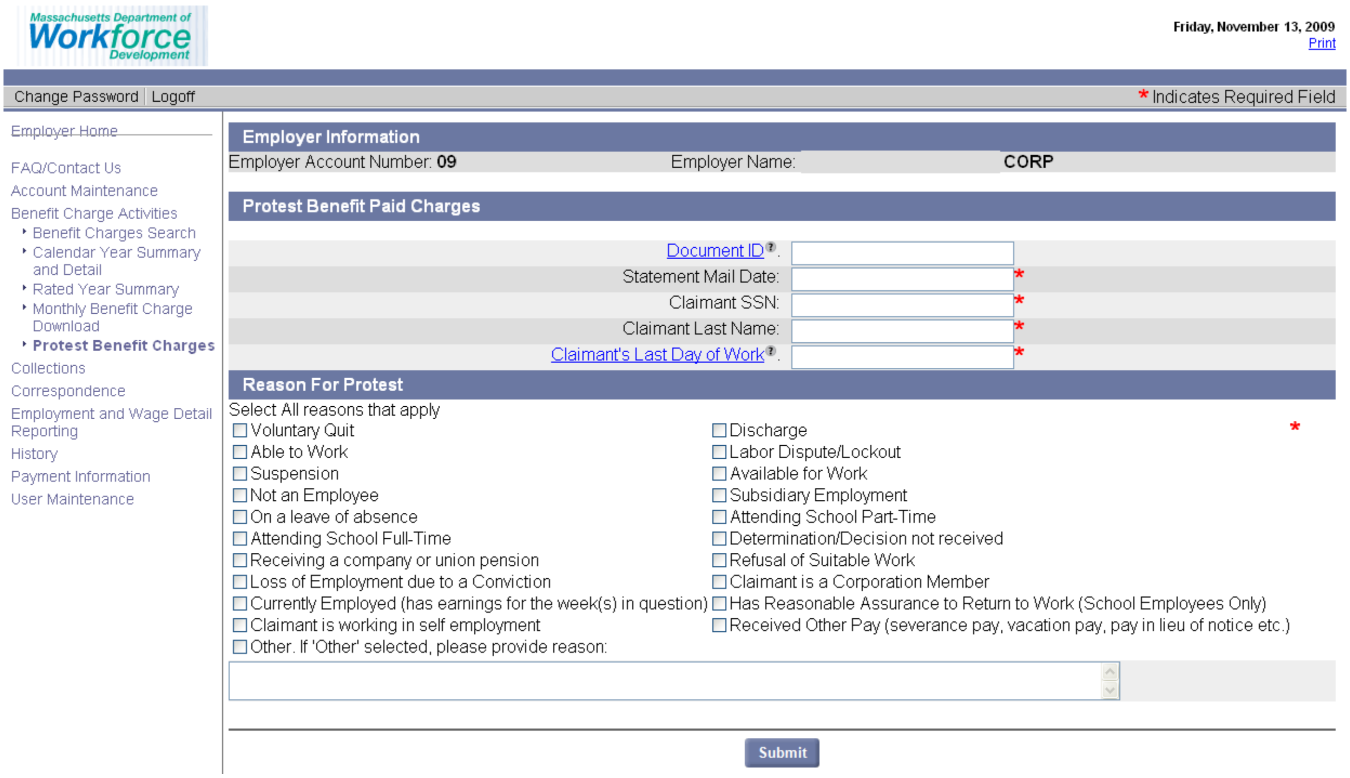
1. Follow the steps outlined in the section 'Navigating to Benefit Charges home page'.
2. Click on the link, 'Monthly Benefit Charge Download'. The following page will appear. Select the month and year for which you wish to download the benefit charges detail. Click on 'Search'.

3. You will be provided with a link to the file containing benefit charges detail. You will be able to download the file to your local folders by clicking on the link and following the prompts.

Protest Benefit Charges:

Employers can protest Benefit Charges by indicating specific charges to protest, claimant information and reason for protest.

1. Follow the steps outlined in the section 'Navigating to Benefit Charges home page'.
2. Click on the link 'Protest Benefit Charges'. The following page will appear.



Massachusetts Department of Workforce Development

Friday, November 13, 2009
Print

Change Password | Logoff

* Indicates Required Field

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
- Benefit Charges Search
- Calendar Year Summary and Detail
- Rated Year Summary
- Monthly Benefit Charge Download
- **Protest Benefit Charges**

Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **09** Employer Name: **CORP**

Protest Benefit Paid Charges

Document ID:
Statement Mail Date: *
Claimant SSN: *
Claimant Last Name: *
Claimant's Last Day of Work: *

Reason For Protest

Select All reasons that apply *

☐ Voluntary Quit	☐ Discharge
☐ Able to Work	☐ Labor Dispute/Lockout
☐ Suspension	☐ Available for Work
☐ Not an Employee	☐ Subsidiary Employment
☐ On a leave of absence	☐ Attending School Part-Time
☐ Attending School Full-Time	☐ Determination/Decision not received
☐ Receiving a company or union pension	☐ Refusal of Suitable Work
☐ Loss of Employment due to a Conviction	☐ Claimant is a Corporation Member
☐ Currently Employed (has earnings for the week(s) in question)	☐ Has Reasonable Assurance to Return to Work (School Employees Only)
☐ Claimant is working in self employment	☐ Received Other Pay (severance pay, vacation pay, pay in lieu of notice etc.)
☐ Other. If 'Other' selected, please provide reason:	

Submit

3. Enter the requested information and click on 'Submit' to confirm the Protest. A confirmation will appear, indicating that your Protest has been submitted.

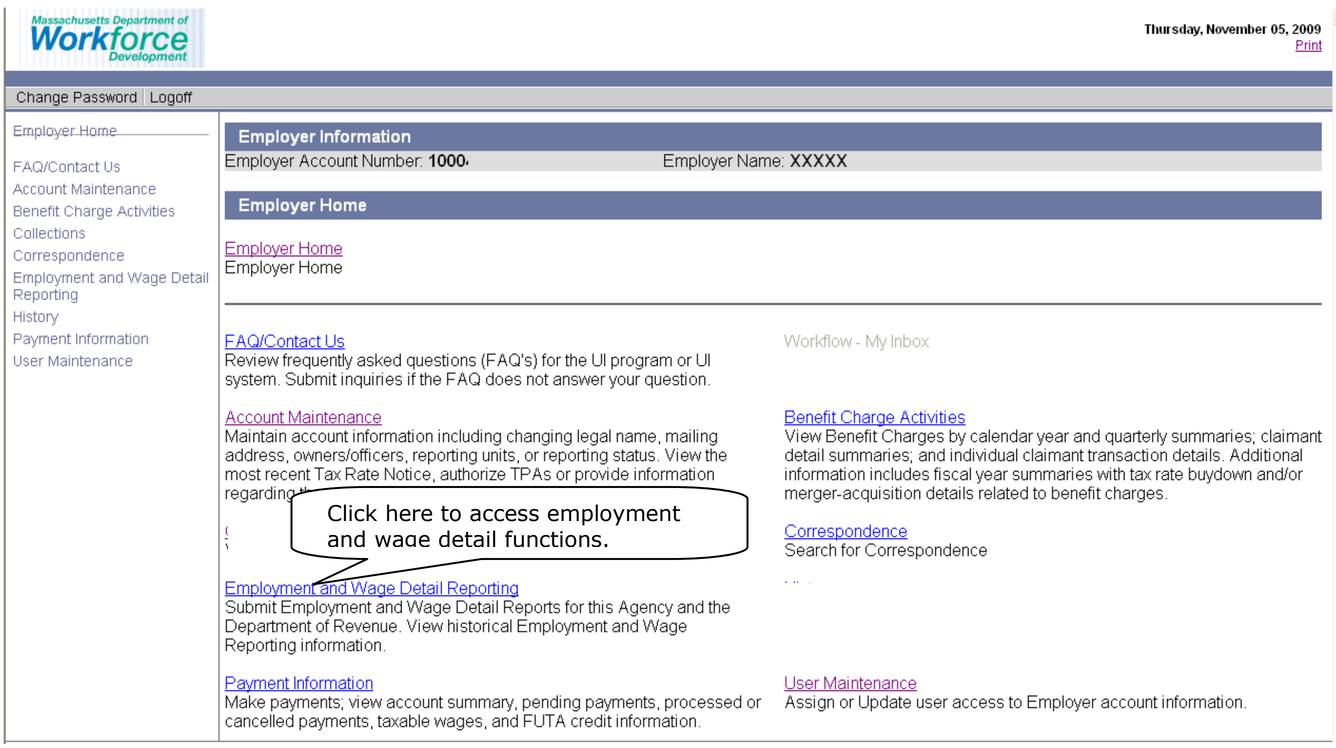
Employment and Wage Detail Reporting

NAVIGATING TO EMPLOYMENT AND WAGE DETAIL REPORTING

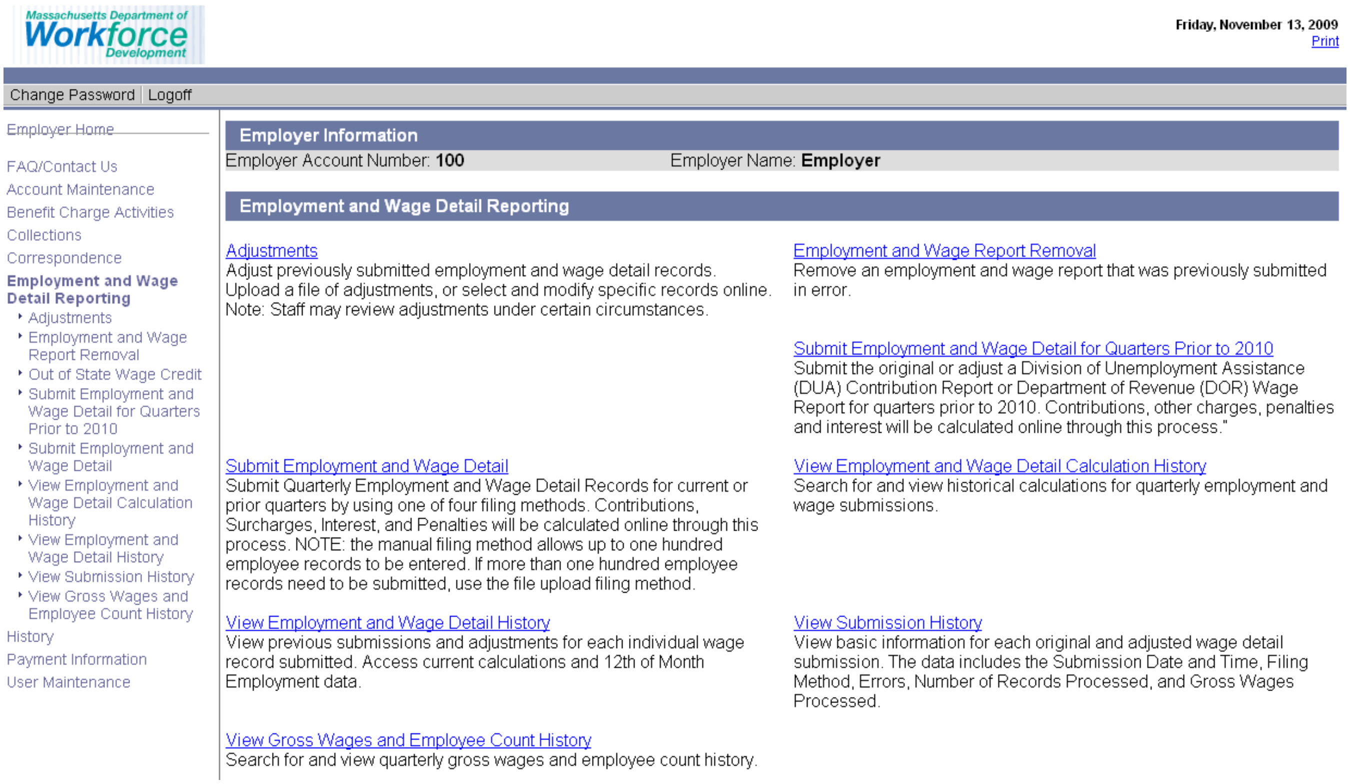
Introduction	This section of the document will explain how an authorized user can navigate to the employment and wage detail functions.

Step-by-Step Instructions:

1. While logged into the employer home page, click on link ‘ Employment and Wage Detail Reporting’



2. The following page will appear, listing the available functions. Click on the corresponding link to access a function.



Massachusetts Department of Workforce Development

Friday, November 13, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail Calculation History
- View Employment and Wage Detail History
- View Submission History
- View Gross Wages and Employee Count History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **100** Employer Name: **Employer**

Employment and Wage Detail Reporting

Adjustments
Adjust previously submitted employment and wage detail records. Upload a file of adjustments, or select and modify specific records online. Note: Staff may review adjustments under certain circumstances.

Employment and Wage Report Removal
Remove an employment and wage report that was previously submitted in error.

Submit Employment and Wage Detail for Quarters Prior to 2010
Submit the original or adjust a Division of Unemployment Assistance (DUA) Contribution Report or Department of Revenue (DOR) Wage Report for quarters prior to 2010. Contributions, other charges, penalties and interest will be calculated online through this process."

Submit Employment and Wage Detail
Submit Quarterly Employment and Wage Detail Records for current or prior quarters by using one of four filing methods. Contributions, Surcharges, Interest, and Penalties will be calculated online through this process. NOTE: the manual filing method allows up to one hundred employee records to be entered. If more than one hundred employee records need to be submitted, use the file upload filing method.

View Employment and Wage Detail Calculation History
Search for and view historical calculations for quarterly employment and wage submissions.

View Employment and Wage Detail History
View previous submissions and adjustments for each individual wage record submitted. Access current calculations and 12th of Month Employment data.

View Submission History
View basic information for each original and adjusted wage detail submission. The data includes the Submission Date and Time, Filing Method, Errors, Number of Records Processed, and Gross Wages Processed.

View Gross Wages and Employee Count History
Search for and view quarterly gross wages and employee count history.

If	Then
You are unable to locate the required maintenance function	You may not have the sufficient privileges to perform this function. Contact your system administrator.

SUBMIT EMPLOYMENT AND WAGE DETAIL

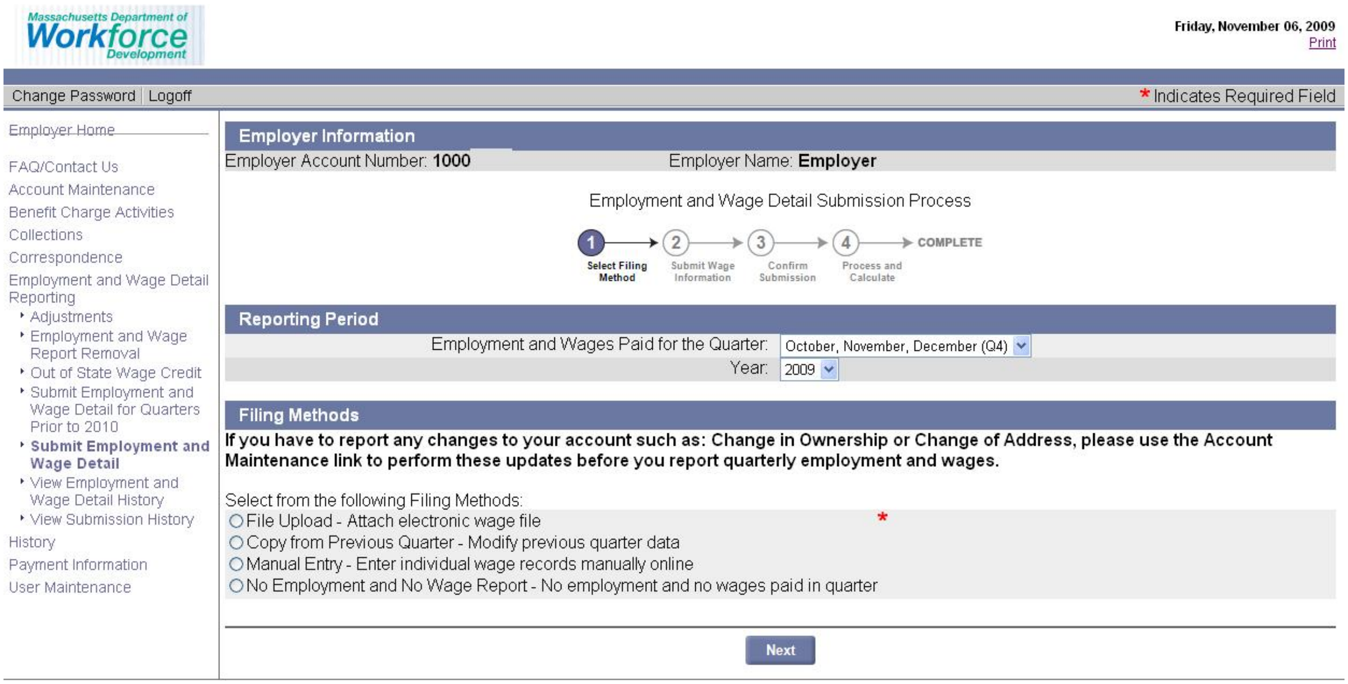
Introduction	This section of the user guide will show how an authorized user can submit employment and wage detail information for employer accounts. It will also be shown how employment and wage detail/submission/calculation history can be viewed. Employment and wage detail reports are due from employers every quarter. The system provides multiple submission options and they are: real-time online file upload, FTP file upload, copy from previous quarter, manual entry, and no employment/wage submission. The employment and wage detail information can be submitted for current or prior quarters by using one of these filing methods. Upon submission, contributions, surcharges, interest, and penalties will be calculated and returned to the user. NOTE: If you wish to submit employment and wage detail for quarters prior to 2010, please refer to the section on 'SUBMIT EMPLOYMENT AND WAGE DETAIL FOR QUARTERS PRIOR TO 2010'. IMPORTANT: The s step by step instructions in this section are limited to capturing details of completing the wage detail submission process in QUEST. In order to understand the process flows, key business rules and changes, security, error handling and for extensive detail on processing Employment and Wage Detail through the new QUEST system, please refer to the addendum: Employment and Wage Detail Guidelines and Information.
Helpful hints	• The manual filing method allows up to one hundred employee records to be entered. If more than one hundred employee records need to be submitted, the file upload method should be used. • It is not possible to submit an employment and wage detail report for future dates. • It is not possible to submit the employment and wage detail report more than once for each quarter. If the report was submitted incorrectly or incompletely, the adjustment or transfer or removal function should be used to make the corrections. • FTP file upload is applicable only for Employers/TPA(s) that submit more than 10,000 records per quarter

Step-by-Step Instructions:

Manual Entry Method:

1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.

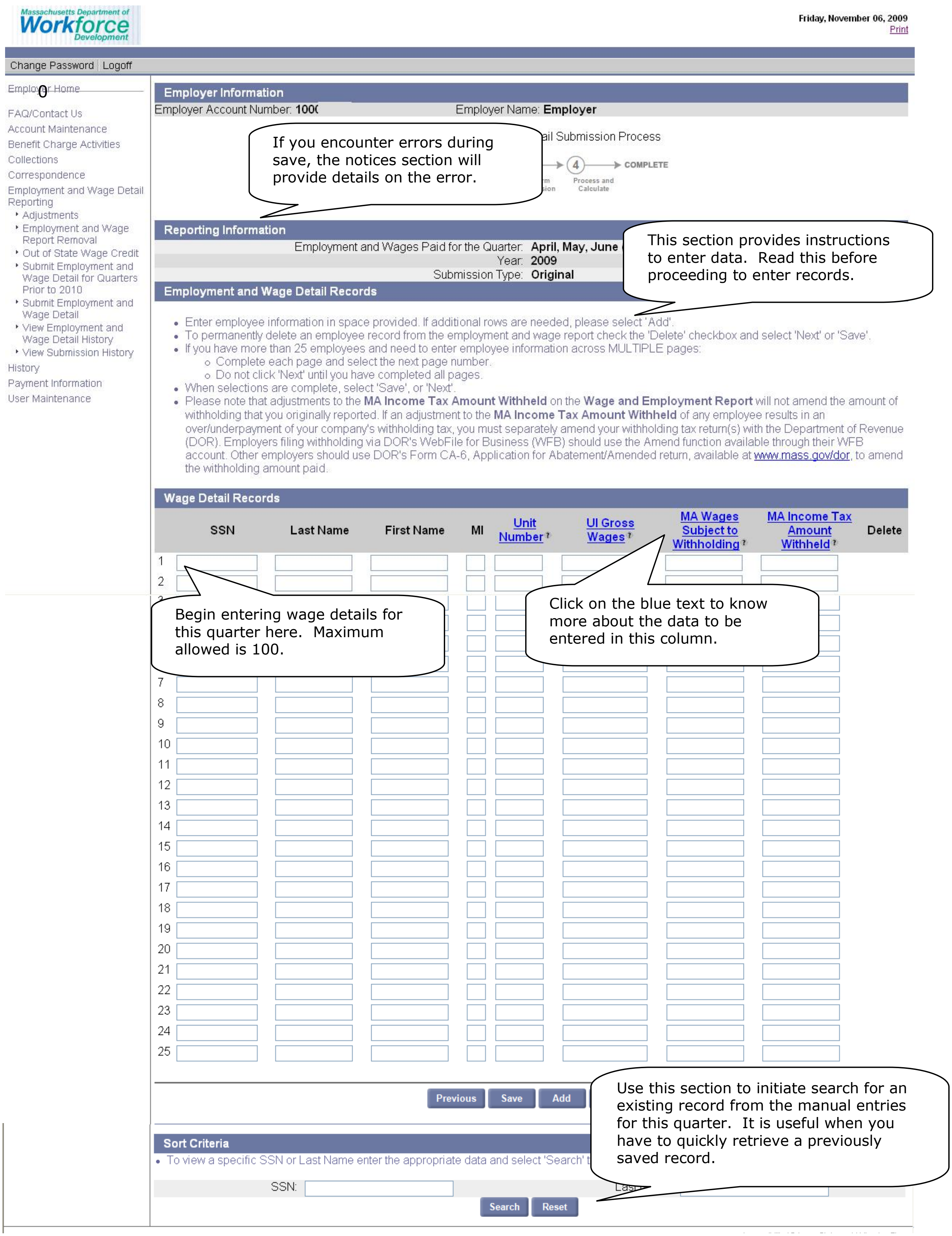
2. Click on the link 'Submit Employment and Wage Detail'. The screen shown below will appear, prompting you to choose from the available filing methods.



3. Using the radio buttons, click on the filing method of your choice. In this case, 'Manual Entry'.

4. The screen shown in the next page will appear. Enter the wage detail information as requested. Please refer to the screenshot for additional information on entering data.

NOTE: The maximum number of records that can be entered using manual entry is limited to 100. The page will initially display 25 blank rows for wage detail entries. Upon reaching 25 records, you can add more records by clicking on 'Add' at the end of the page. If you wish to periodically save the information being entered, click on the 'Save' button at the end of the page.



Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff

Employer Home
FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **100(**   Employer Name: **Employer**

...ail Submission Process

→ 4 → COMPLETE
Process and Calculate

Reporting Information

Employment and Wages Paid for the Quarter: **April, May, June**
Year: **2009**
Submission Type: **Original**

Employment and Wage Detail Records

- Enter employee information in space provided. If additional rows are needed, please select 'Add'.
- To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select the next page number.
  - Do not click 'Next' until you have completed all pages.
- When selections are complete, select 'Save', or 'Next'.
- Please note that adjustments to the **MA Income Tax Amount Withheld** on the **Wage and Employment Report** will not amend the amount of withholding that you originally reported. If an adjustment to the **MA Income Tax Amount Withheld** of any employee results in an over/underpayment of your company's withholding tax, you must separately amend your withholding tax return(s) with the Department of Revenue (DOR). Employers filing withholding via DOR's WebFile for Business (WFB) should use the Amend function available through their WFB account. Other employers should use DOR's Form CA-6, Application for Abatement/Amended return, available at www.mass.gov/dor, to amend the withholding amount paid.

Wage Detail Records

	SSN	Last Name	First Name	MI	Unit Number	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Delete
1									
2									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Previous | Save | Add

Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' t...

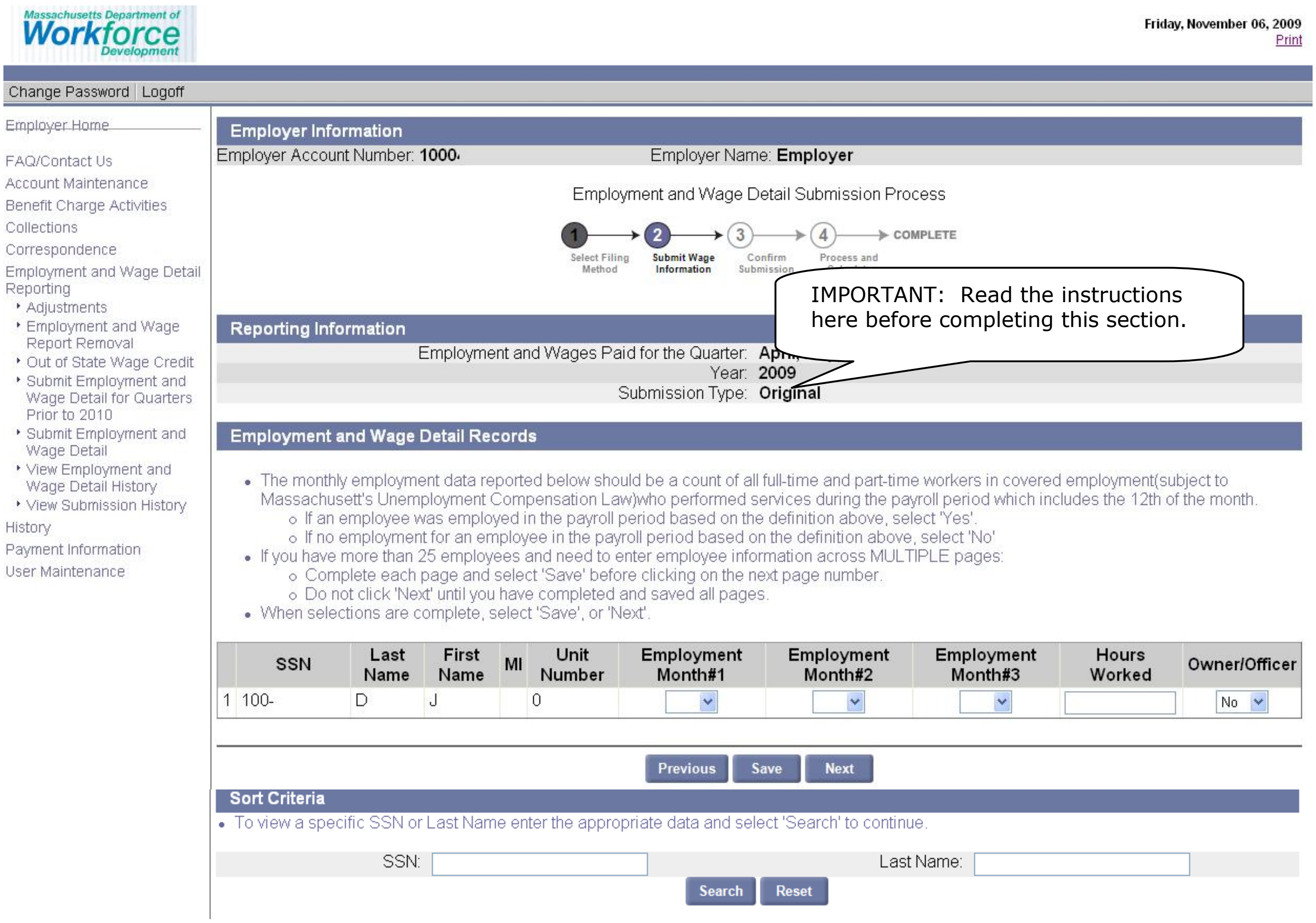
SSN: Last...

Search | Reset

5. Once you have entered all the information, click on the 'Next' button to proceed to the next step.

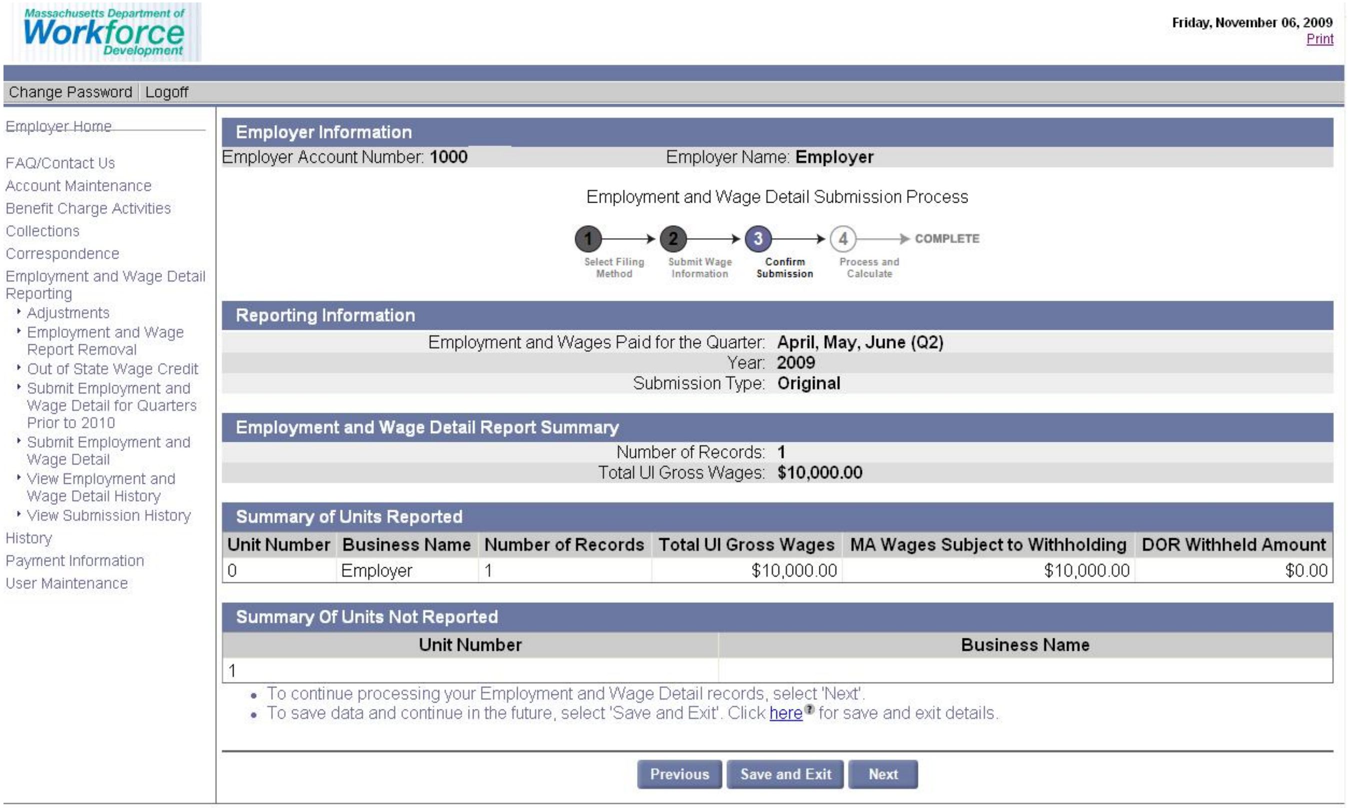
6. The following screen will appear. Use the instructions on this page to complete the requested information.

NOTE: If required, please refer to the 'HOURS WORKED GUIDELINE' in Addendum.



7. If you intend to save the records entered so far and return later, click on the 'Save' button. Otherwise, click 'Next' to continue.

8. The next page will display a summary of the gross wage detail information you entered. The wage detail information you entered will be grossed up at the reporting unit level (screenshot shown below). Click 'Next' to continue.



Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 **Confirm Submission** → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **April, May, June (Q2)**
Year: **2009**
Submission Type: **Original**

Employment and Wage Detail Report Summary

Number of Records: **1**
Total UI Gross Wages: **$10,000.00**

Summary of Units Reported

Unit Number	Business Name	Number of Records	Total UI Gross Wages	MA Wages Subject to Withholding	DOR Withheld Amount
0	Employer	1	$10,000.00	$10,000.00	$0.00

Summary Of Units Not Reported

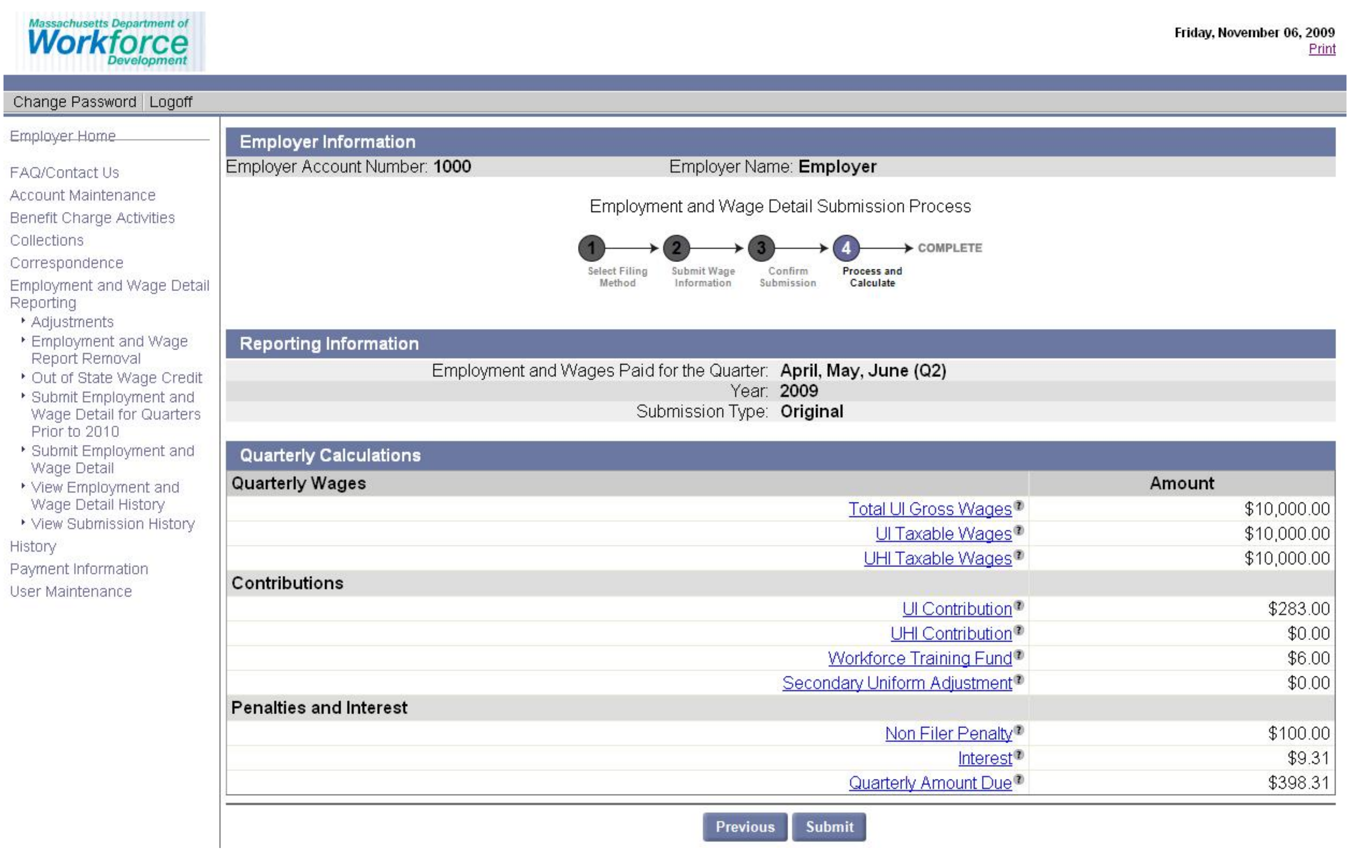
Unit Number	Business Name
1	

- To continue processing your Employment and Wage Detail records, select 'Next'.
- To save data and continue in the future, select 'Save and Exit'. Click here for save and exit details.

Previous | Save and Exit | Next

9. On the next page, you will be requested to certify the employment and wage detail information being submitted. Use the checkbox to complete the certification and click 'Next' to continue.

10. A page will be displayed as shown below with the quarterly contributions due. If you would like to revisit your wage submission details at this point, you can do so by clicking on 'Previous'.



Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 **Process and Calculate** → COMPLETE

Reporting Information

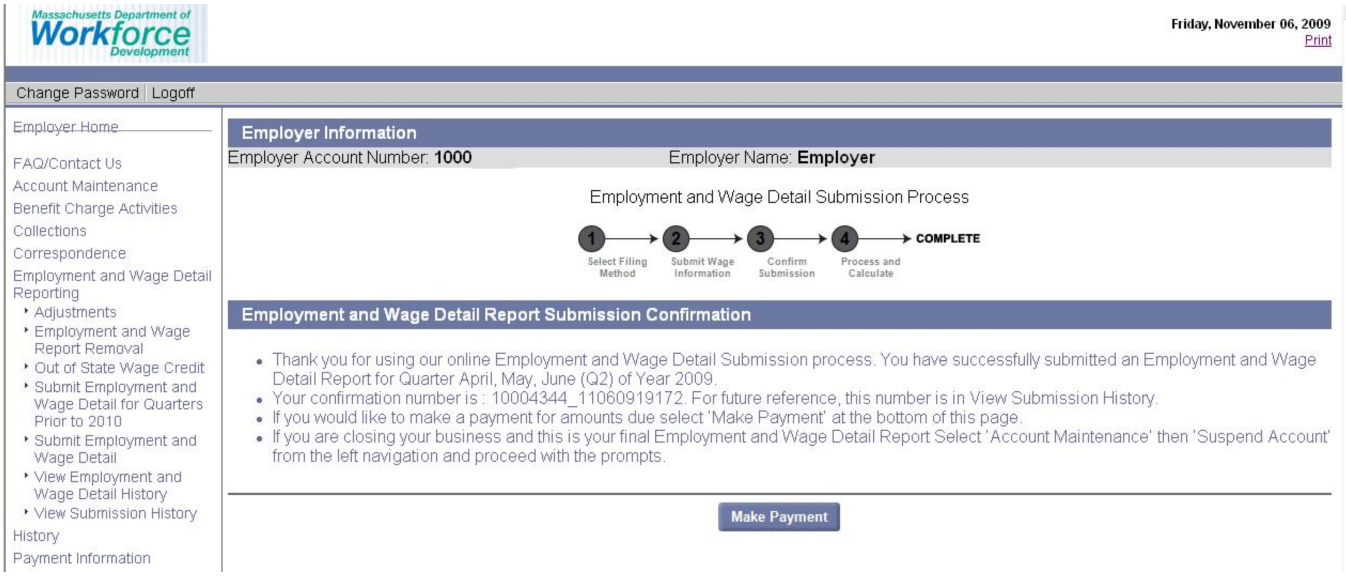
Employment and Wages Paid for the Quarter: **April, May, June (Q2)**
Year: **2009**
Submission Type: **Original**

Quarterly Calculations

Quarterly Wages	Amount
Total UI Gross Wages	$10,000.00
UI Taxable Wages	$10,000.00
UHI Taxable Wages	$10,000.00
Contributions	
UI Contribution	$283.00
UHI Contribution	$0.00
Workforce Training Fund	$6.00
Secondary Uniform Adjustment	$0.00
Penalties and Interest	
Non Filer Penalty	$100.00
Interest	$9.31
Quarterly Amount Due	$398.31

Previous | Submit

11. If you are ready to submit the wage detail report, click on 'Submit'. A confirmation number for your submission will be displayed on the next page indicating that the process is complete. On this page the 'Make Payment' link is also displayed, which will lead you to the payment process.



File Upload method:

This method allows employers to submit information via a self service application. The file upload method should be used, whenever there are more than 100 records (the upper limit for manual entry). However, this method can also be used to process a lesser number of records. Within the file upload method, 3 options are available. They are: ICESA, EFW2 and Delimited. Key facts about file upload method are:

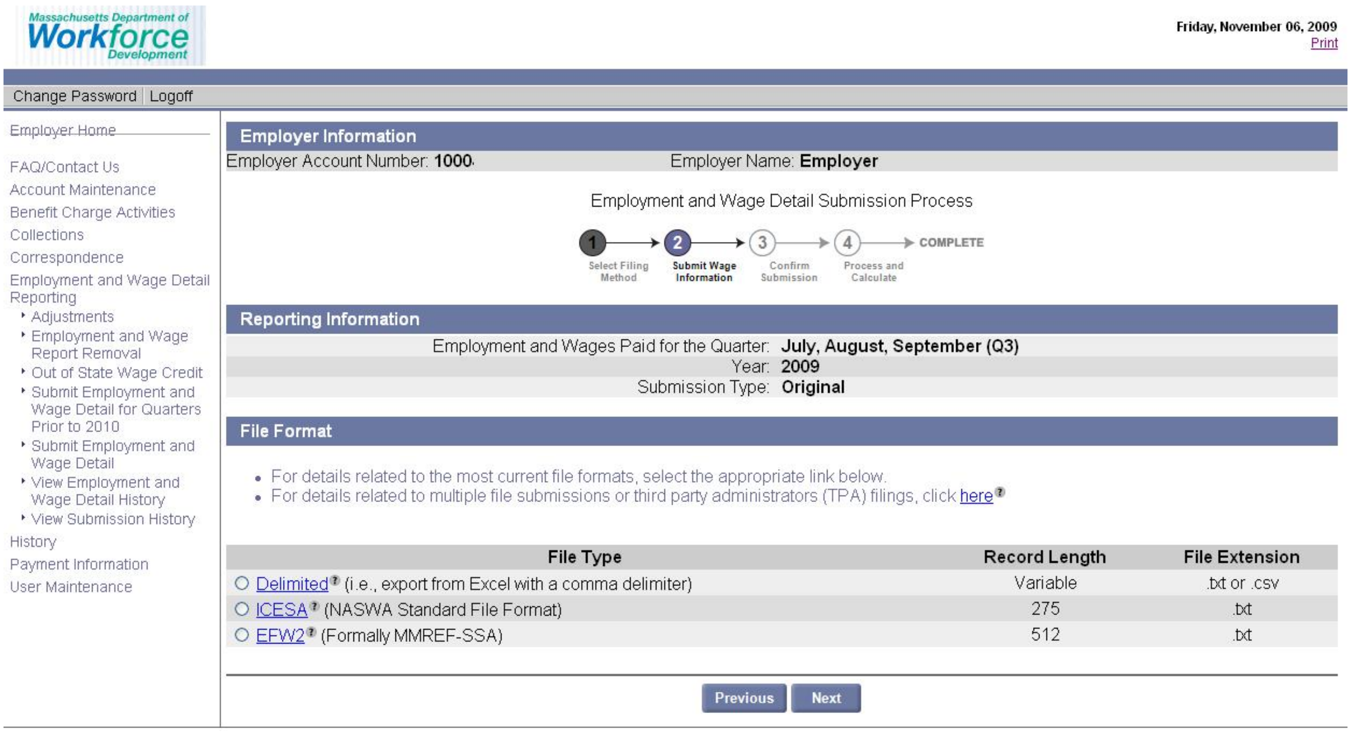
- The file upload method can be used to process up to 10,000 records. If you have more than 10,000 records, the FTP method should be used.
- The uploaded wage detail files would be processed immediately, if your file size is within 200 records. Otherwise, your file would be processed as part of a scheduled batch. You should be able to view the status of your submission the following day, using the link 'View Submission History'.
- The process to upload files using ICESA, EFW2 or Delimited is similar with the only difference being in the file format. Please refer to the addendum for additional information and extensive detail on file format, data definitions, formatting and file generation instructions for each of these formats.

<u>Step by Step Instructions:</u>

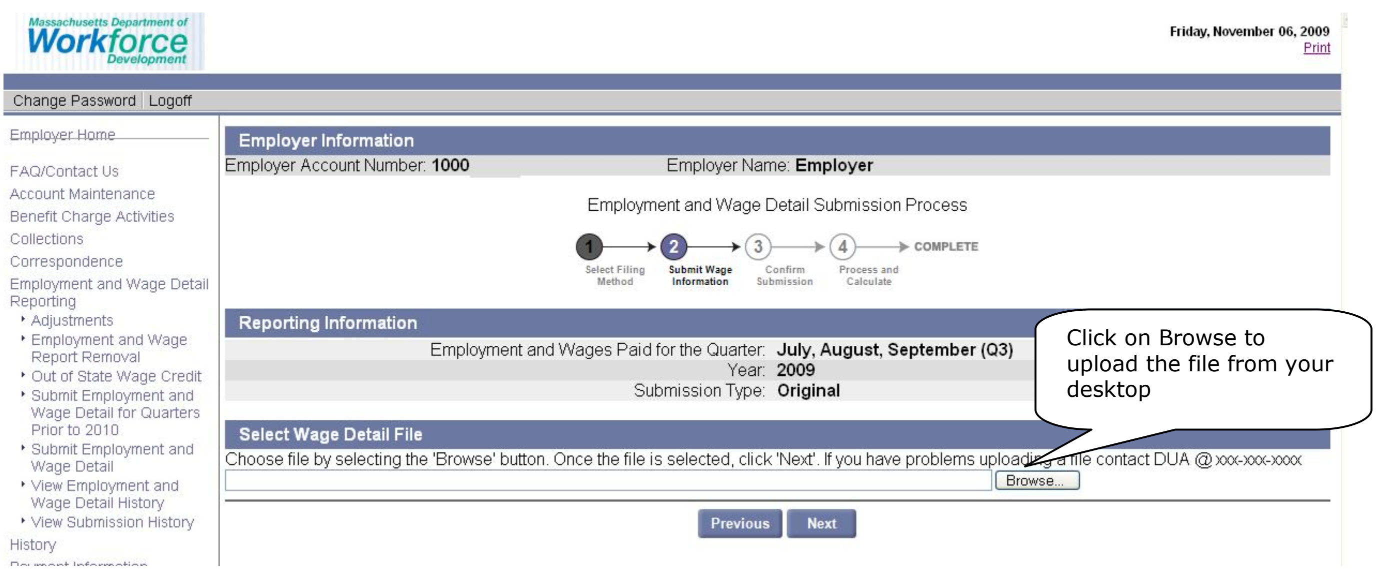
For the purposes of this illustration the 'Delimited' option will be used. The step by step instructions to process ICESA and EFW2 files would be the same, except for the file formats. In order to use this delimited option, the data that needs to be uploaded should be in the form of a comma delimited text file. The delimited file should file format should be like below (only one record shown for a sample).

10000000,0,20092,1,1,1,100000000,Smith,John,P,14000,0,0,255,n,

1. Follow the first 3 steps outlined in 'Manual Entry Method'.
2. Use the file upload method as your choice from the list of options and click 'Next'. The following screen will appear. On this screen choose 'Delimited' as your option and click 'Next'.



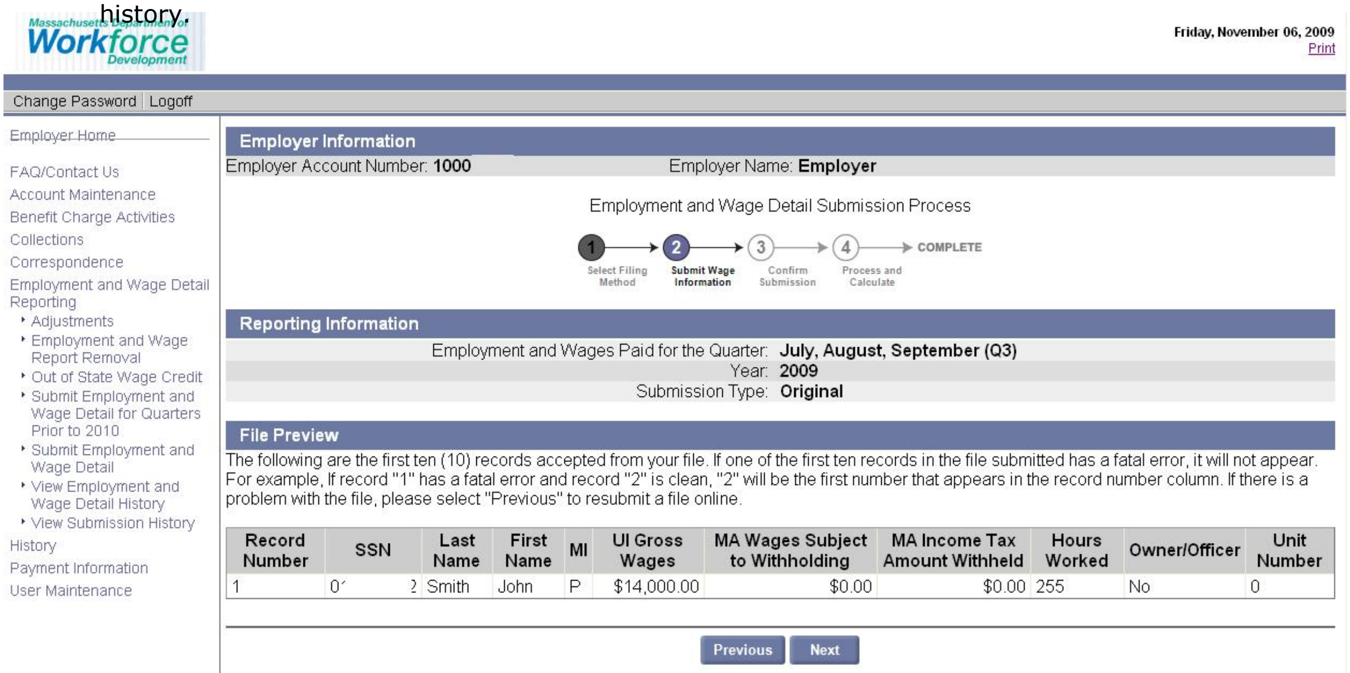
3. The following screen will appear. Upload the file from your desktop and click 'Next'.



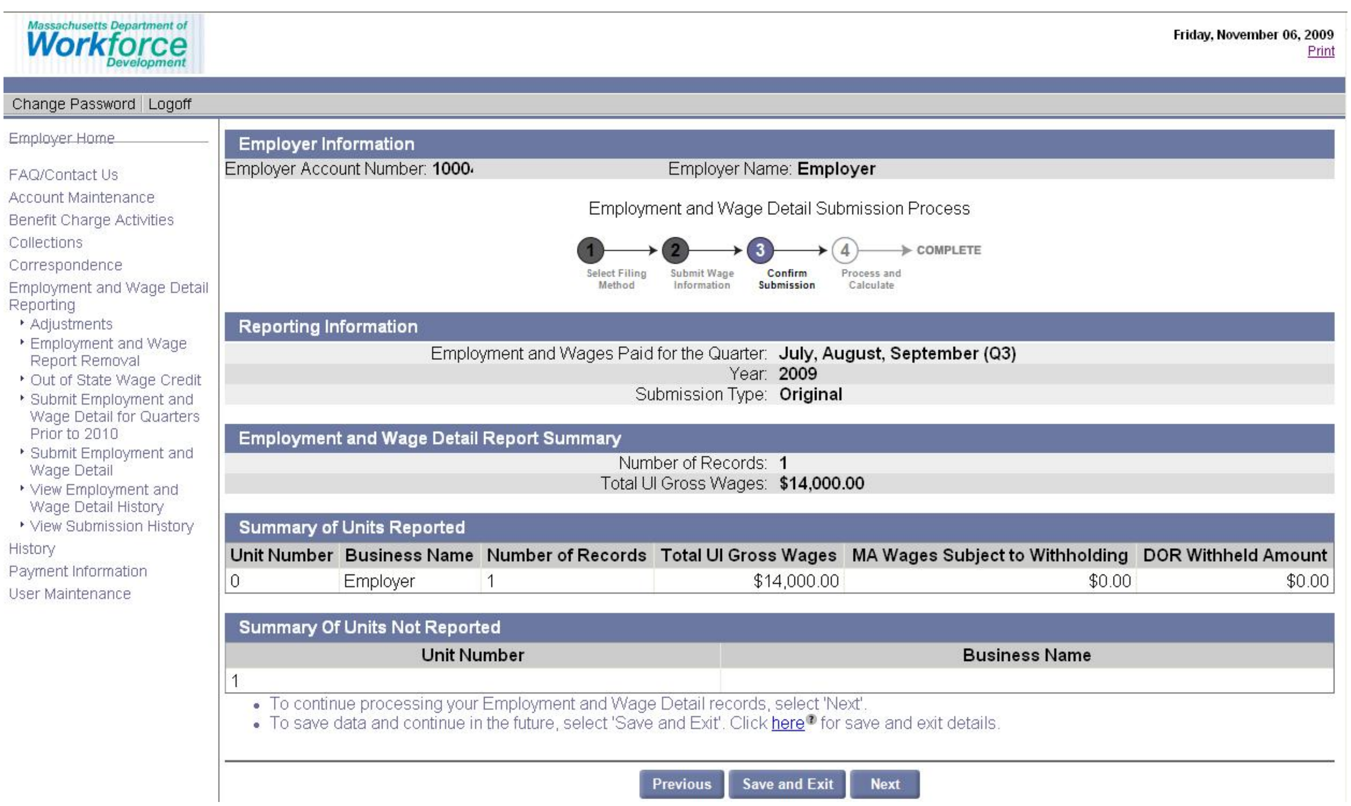
4. The file will be processed by the system and the screen will look like below after successful upload. If the file upload is successful, a confirmation will be displayed along with the first 10 rows of data from the uploaded file. If errors are found in the file, the errors will be displayed. The user may choose to either correct the errors or ignore them. If the user chooses to ignore the errors and a record

contains a fatal error (e.g., a missing SSN), the system will reject the specific record. The system will accept records with non fatal errors (e.g., hours worked missing). Please refer to the addendum for a list of error messages encountered during employment and wage uploads.

NOTE: If you uploaded more than 200 records, the process will end here, with a message that your file will be processed in the batch process. You will be able to check the process status in the submission history.



Click 'Next' to continue. The next page will display a summary of the gross wage detail information you entered. (as shown below). The wage detail information you entered will be summed up at the reporting unit level.



5. From here on, the process is similar to manual entry method. Go to step 9 of the manual entry if you wish to continue reading instructions.

No Employment and No Wage Report:

'No Employment and No Wage Report' option can be used by employers if they intend to report no employment and wages for a quarter. This option should be used only if there are no DOR (Dept. of Revenue) or DUI wages for the quarter. This filing method should not be used if the employer had employees under employ who did not earn any wages during the quarter. In such cases, their information must be reported via one of the other filing methods using a "$0.00" entry under UI Gross Wages. Step by step instructions are:

1. Follow the first 3 steps outlined in 'Manual Entry Method'.

2. On the screen that appears, use 'No Employment and No Wage Report' as your choice from the list of options. Click 'Next'.

3. The following screen will appear. Complete the filing process by clicking 'Submit' and a confirmation page will appear afterwards.

Copy from previous quarter:

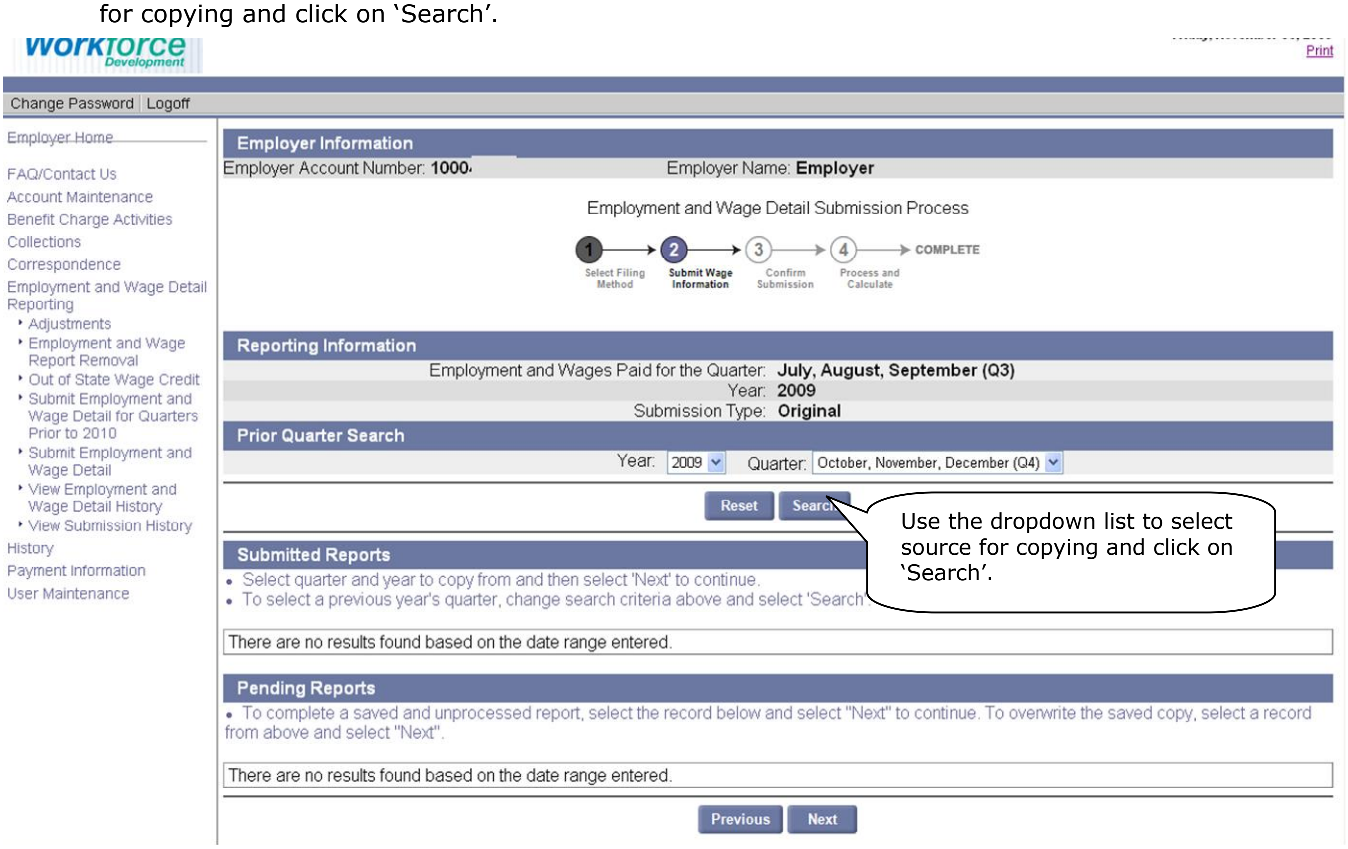
When this method is used, the employee details from a past quarter (as specified by the user) are copied into the quarter for which you are filing, thereby reducing the data entry time.

NOTE: Only the employee details will be copied from the previous quarter. The wage details from each employee record will not be copied.

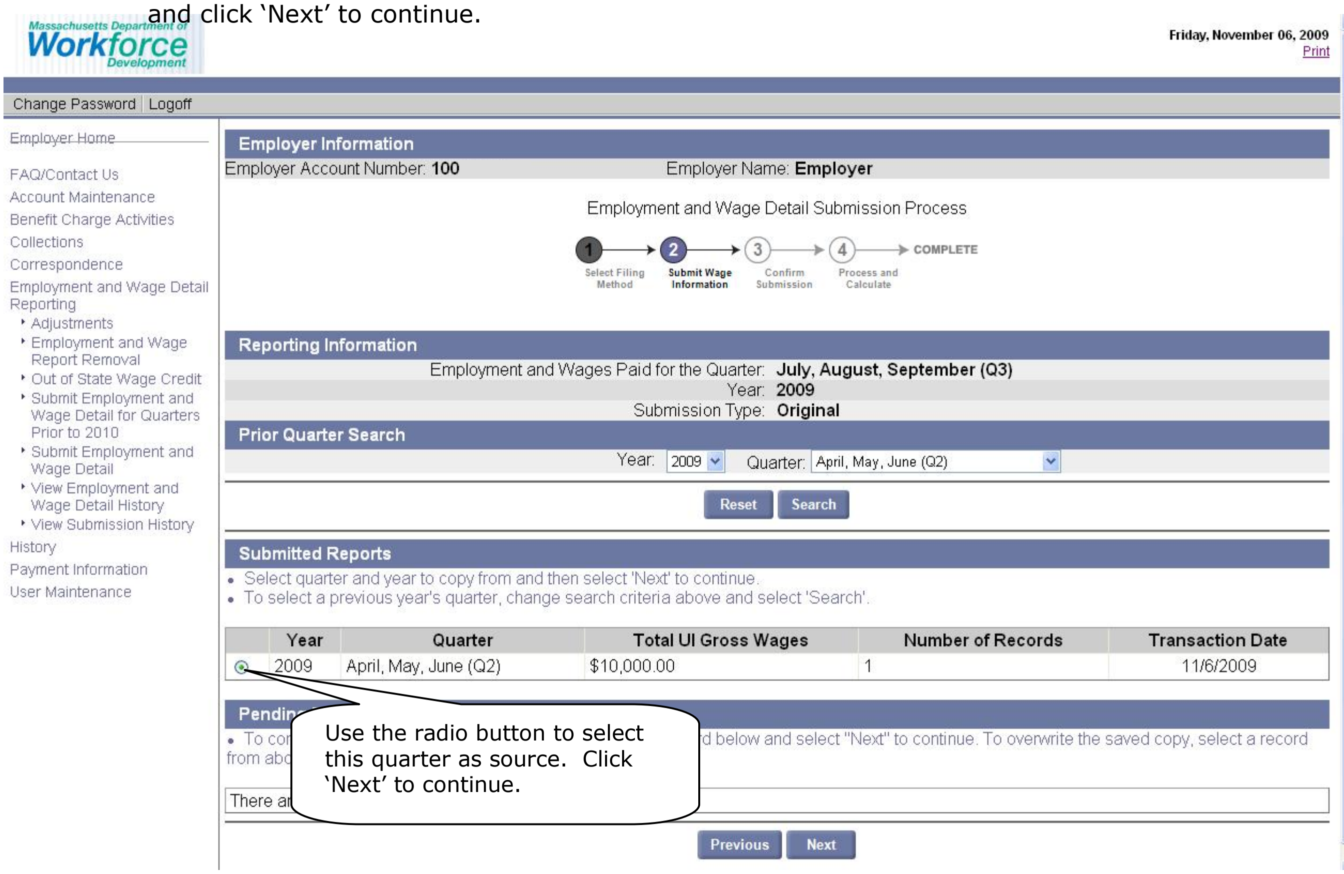
1. Follow the first 3 steps outlined in 'Manual Entry Method'.

2. Use 'Copy from Previous Quarter' as your choice from the list of options. Click 'Next'.

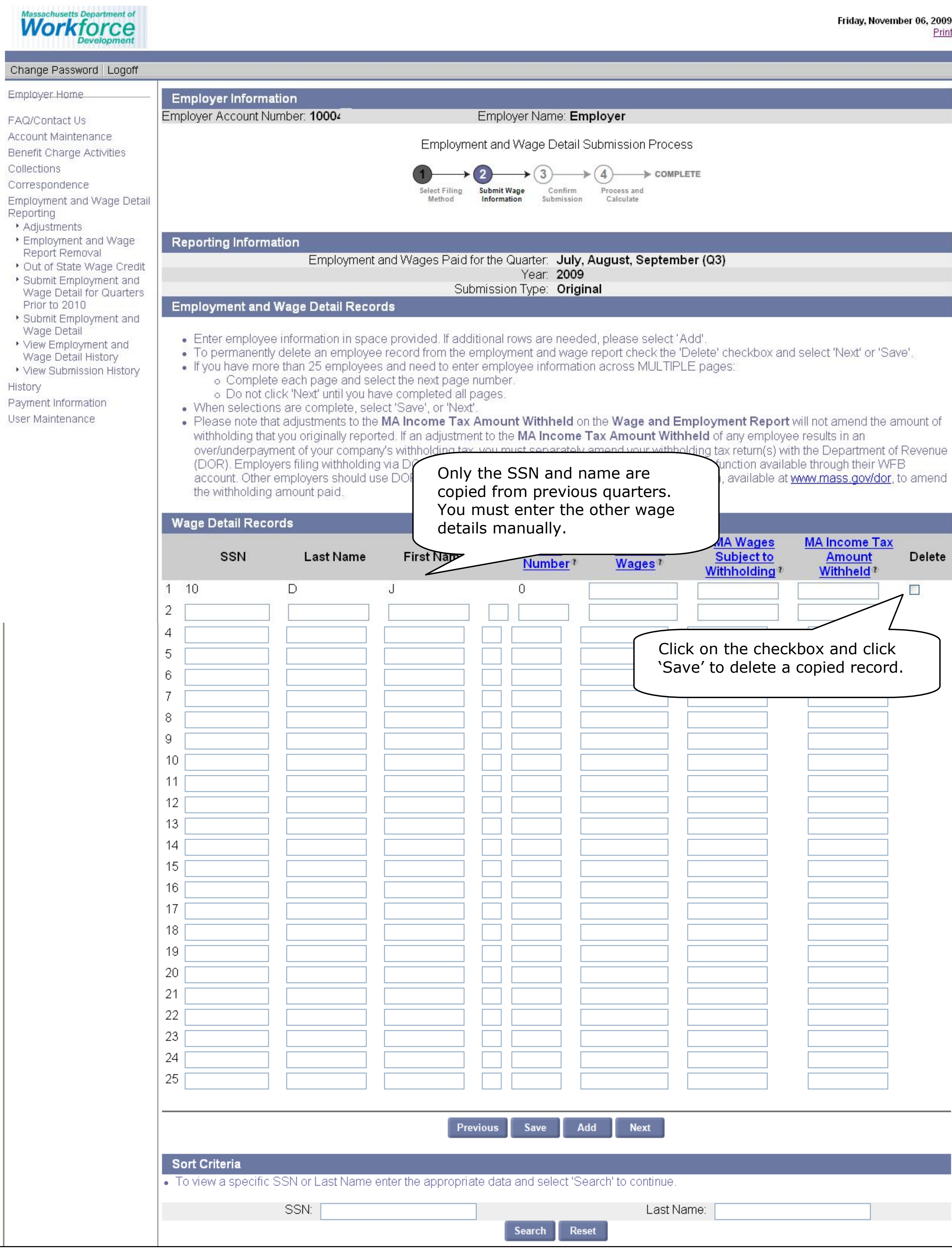
3. The following screen will appear. Use the dropdown list to select the quarter to be used as the source for copying and click on 'Search'.



4. The quarter you searched for will appear as shown below. Use the radio button to confirm it as source and click ‘Next’ to continue.



5. The screen shown in the next page will appear. You will see that only the name and SSN details of the employee from the previous quarter are copied. You also have the option to delete any record copied over.



Massachusetts Department of Workforce Development

Friday, November 06, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 Submit Wage Information → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **July, August, September (Q3)**
Year: **2009**
Submission Type: **Original**

Employment and Wage Detail Records

- Enter employee information in space provided. If additional rows are needed, please select 'Add'.
- To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select the next page number.
  - Do not click 'Next' until you have completed all pages.
- When selections are complete, select 'Save', or 'Next'.
- Please note that adjustments to the **MA Income Tax Amount Withheld** on the **Wage and Employment Report** will not amend the amount of withholding that you originally reported. If an adjustment to the **MA Income Tax Amount Withheld** of any employee results in an over/underpayment of your company's withholding tax, you must separately amend your withholding tax return(s) with the Department of Revenue (DOR). Employers filing withholding via D... function available through their WFB account. Other employers should use DO..., available at www.mass.gov/dor, to amend the withholding amount paid.

Only the SSN and name are copied from previous quarters. You must enter the other wage details manually.

Wage Detail Records

	SSN	Last Name	First Name		Number	Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Delete
1	10	D	J		0				☐
2									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Click on the checkbox and click 'Save' to delete a copied record.

Previous | Save | Add | Next

Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.

SSN: Last Name:

Search | Reset

6. Once you have modified all the information as necessary, click on 'Next' to continue.
7. From here on, the process is the same as the manual entry filing method. If required, refer to step 7 of the instructions for manual entry and continue to read from there.

FTP Method:

The secure FTP processes provide employers with extremely larger amounts of data (over 10,000 records) a method to submit information via an FTP folder. Special set-up is required for FTP submitters with secure access to individual employer folders. Data will be processed in over-night batch and acknowledgement files will be provided in separate FTP folder on the next day for review. Submission and error history will also be viewable online by logging onto the self-service application.

Please refer to the following sections of the addendum on details on the FTP method.

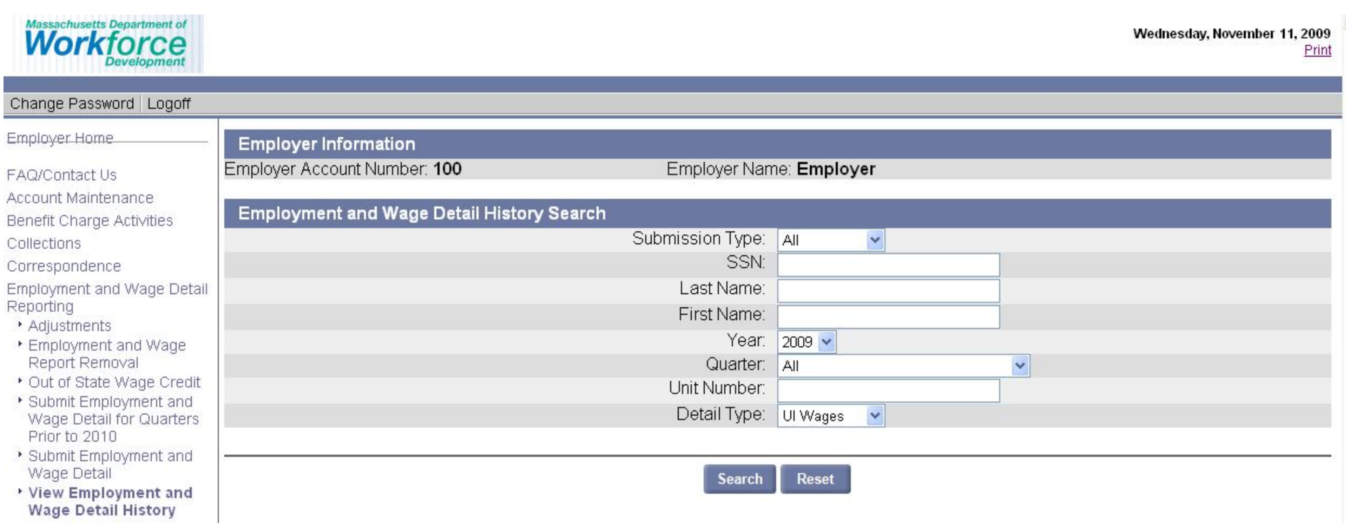
- Employment and Wage Submission Guidelines and Information
- Delimited File Format Specification
- ICSE File Format Specification
- EFW2 File Format Specification

VIEW EMPLOYMENT AND WAGE DETAIL HISTORY

This function allows you to view previously submitted employment and/or wage detail records for all quarters in a year or by individual quarters. You have the option to view original submissions and/or adjustments. You can also limit your search to a specific record by name/SSN. Additionally, the search can be limited to specific reporting units.

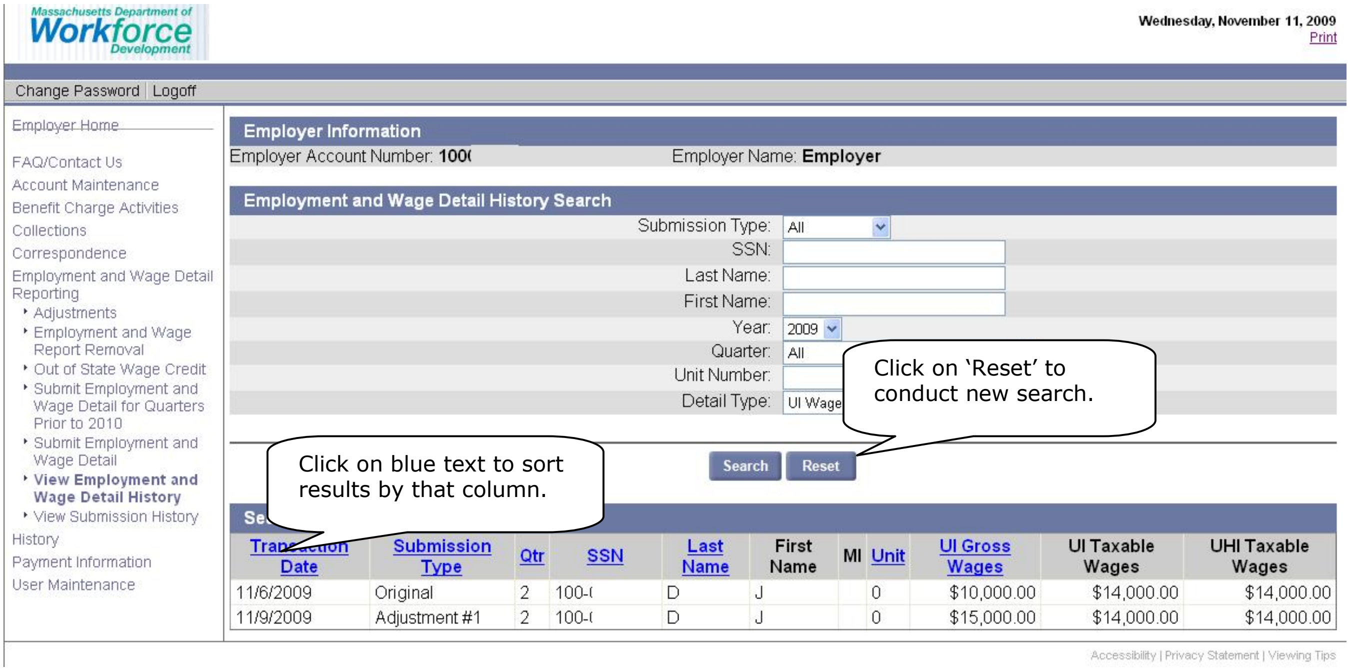
<u>Step by step instructions are:</u>

1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.
2. Click on the link: 'View Employment and Wage Detail History'. The following page will appear.



3. Enter your search criteria. As mentioned in the introduction, you can limit your search results by specifying appropriate search criteria.

4. Click on 'Search'. The search results will appear as shown in the following screen.



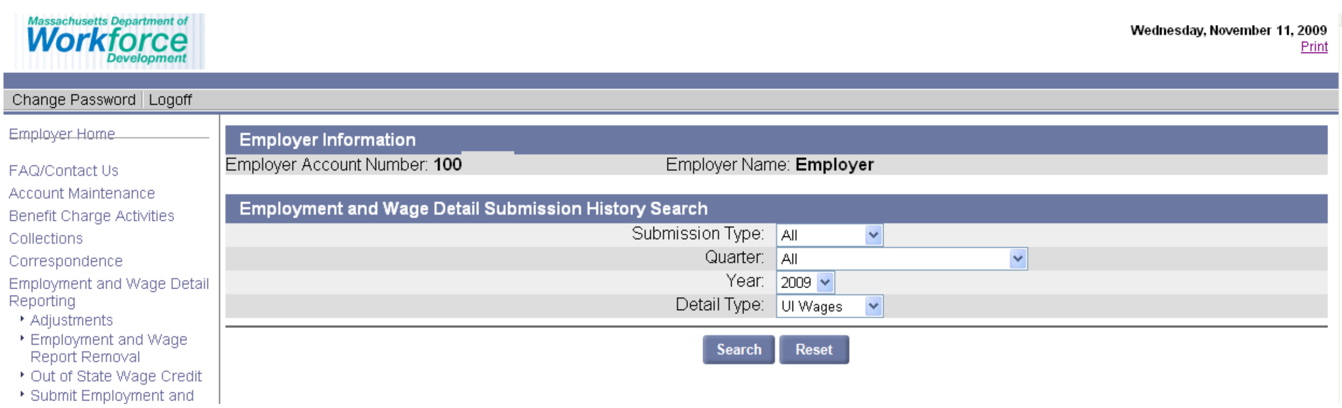
VIEW SUBMISSION HISTORY

This function allows you to view the submission history for employment and wage detail records. You can filter search results by: Submission Type (Original/Adjustment), Quarter, Year, Detail Type (UI Wages, DOR Wages, or Employment).

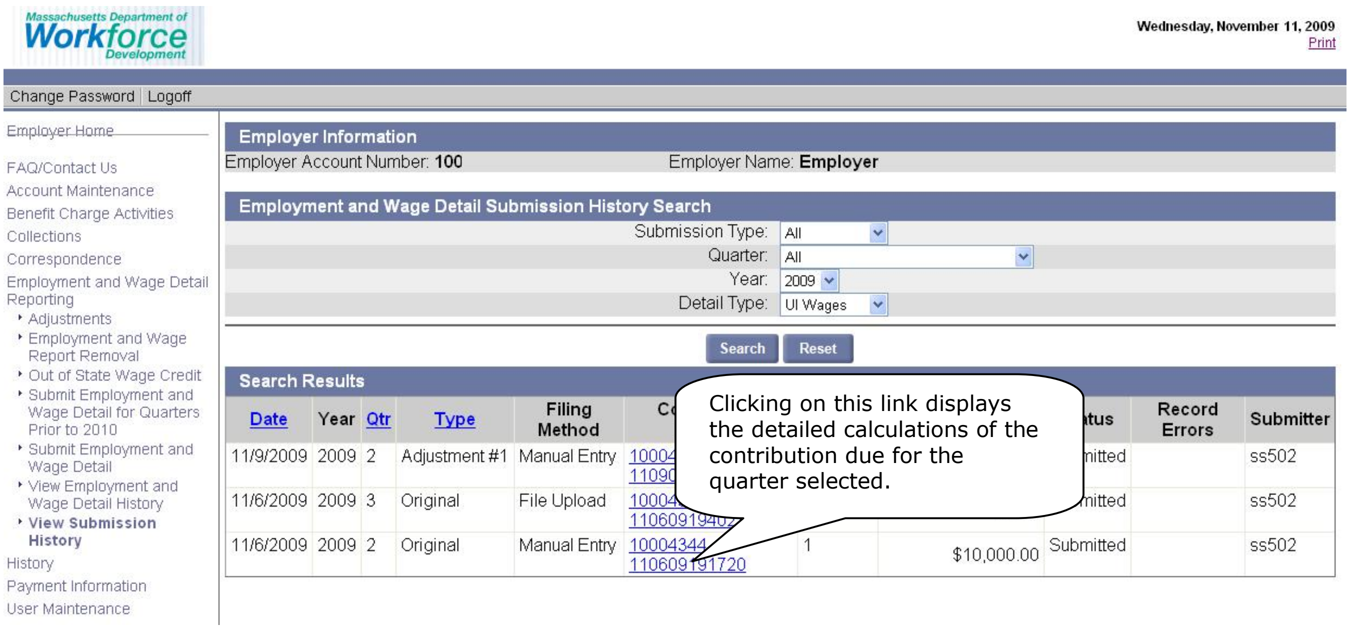
<u>Step by Step instructions are:</u>

1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.

2. Click on the link: 'View Submission History'. The following screen will appear. Enter your search criteria and click on 'Search'.



3. The search results will appear as shown below.



ADJUSTMENTS

Introduction	This section of the user guide will show how an authorized user can adjust previously submitted employment and wage detail records. The adjustment function allows the user to modify/add/delete records as many times as required. There are 3 methods available to perform adjustments: Upload a file of adjustments via self-service, upload an adjustments file via FTP or select and modify specific records online. All completed adjustments can be viewed in employment and wage detail history. In some cases, an employer submitted adjustment may require additional review by DUA staff, before the adjustment can be applied.

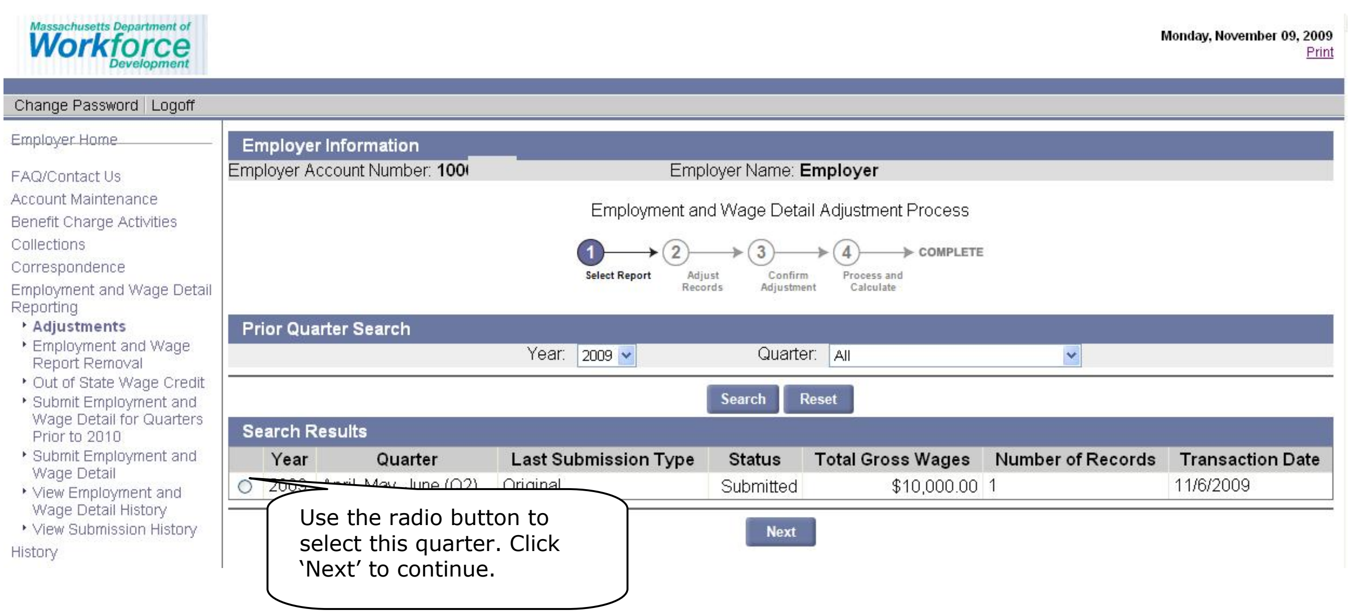
Step-by-Step Instructions:

Manual entry method:

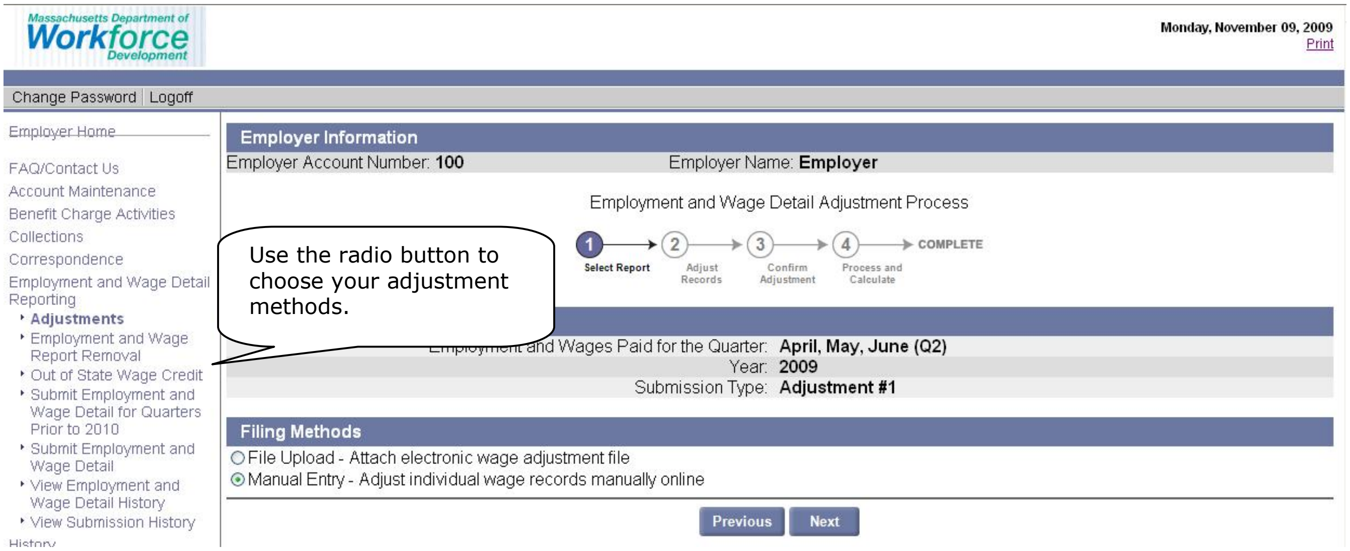
1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.

2. Click on the link 'Adjustments'. The following screen will appear: Search for the prior quarter that needs an adjustment of wage details using the dropdown menu. Click on 'Search'.

3. The following page will appear. Use the radio button to select the quarter of your choice. Click 'Next' to continue.

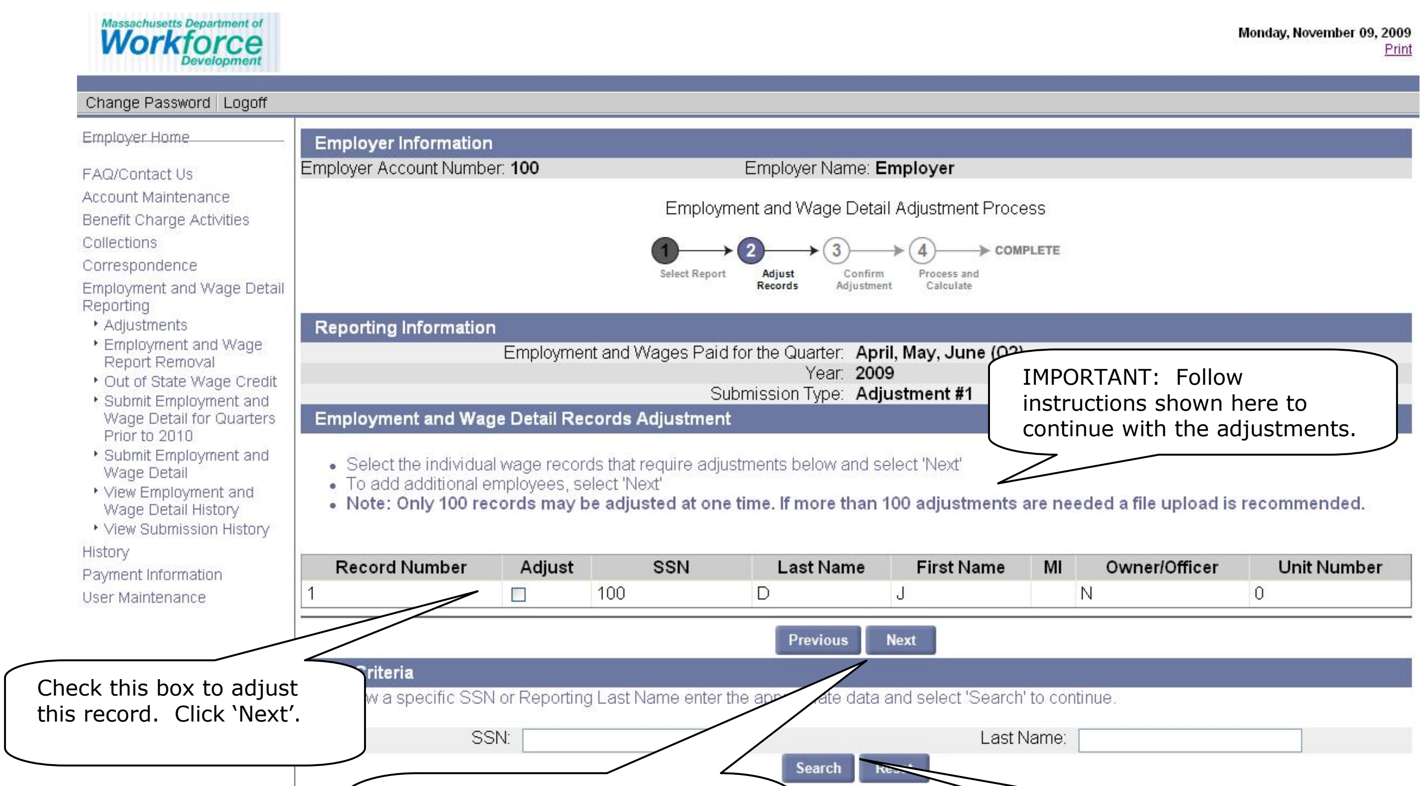


4. You will be prompted to choose from the available methods of adjustment.

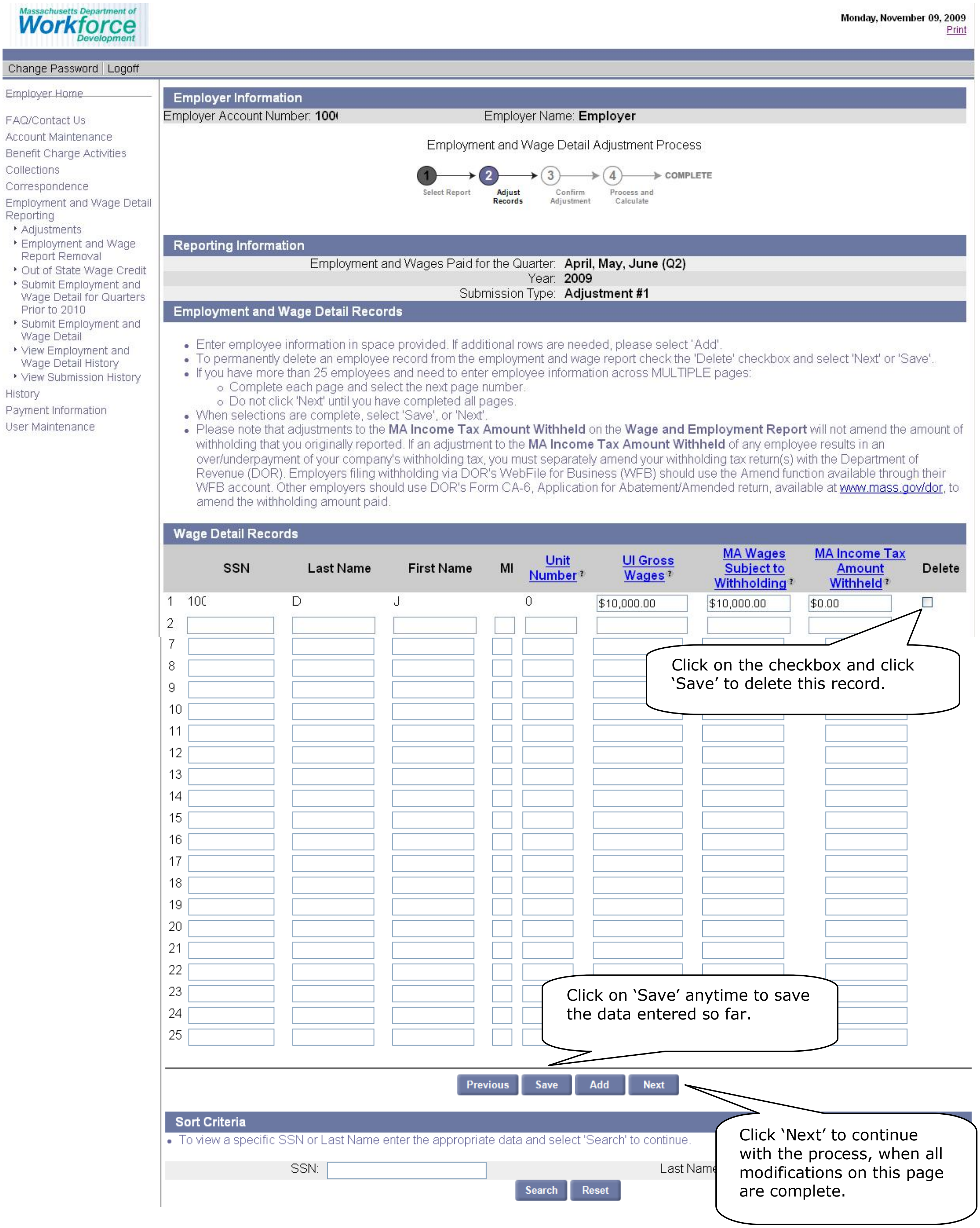


5. Choose the 'Manual Entry' method. If you have to adjust more than 100 records, the file upload method should be used.

6. The following page will appear. Refer to the instructions on the page to continue with the adjustment.



7. The following … details agains… adjustment. … lick 'Next' to c…



Massachusetts Department of Workforce Development

Monday, November 09, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **100(** Employer Name: **Employer**

Employment and Wage Detail Adjustment Process

1 Select Report → 2 **Adjust Records** → 3 Confirm Adjustment → 4 Process and Calculate → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **April, May, June (Q2)**
Year: **2009**
Submission Type: **Adjustment #1**

Employment and Wage Detail Records

- Enter employee information in space provided. If additional rows are needed, please select 'Add'.
- To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
- If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
  - Complete each page and select the next page number.
  - Do not click 'Next' until you have completed all pages.
- When selections are complete, select 'Save', or 'Next'.
- Please note that adjustments to the **MA Income Tax Amount Withheld** on the **Wage and Employment Report** will not amend the amount of withholding that you originally reported. If an adjustment to the **MA Income Tax Amount Withheld** of any employee results in an over/underpayment of your company's withholding tax, you must separately amend your withholding tax return(s) with the Department of Revenue (DOR). Employers filing withholding via DOR's WebFile for Business (WFB) should use the Amend function available through their WFB account. Other employers should use DOR's Form CA-6, Application for Abatement/Amended return, available at www.mass.gov/dor, to amend the withholding amount paid.

Wage Detail Records

	SSN	Last Name	First Name	MI	Unit Number	UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Delete
1	10C	D	J		0	$10,000.00	$10,000.00	$0.00	☐
2									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Click on the checkbox and click 'Save' to delete this record.

Click on 'Save' anytime to save the data entered so far.

Previous | Save | Add | Next

Click 'Next' to continue with the process, when all modifications on this page are complete.

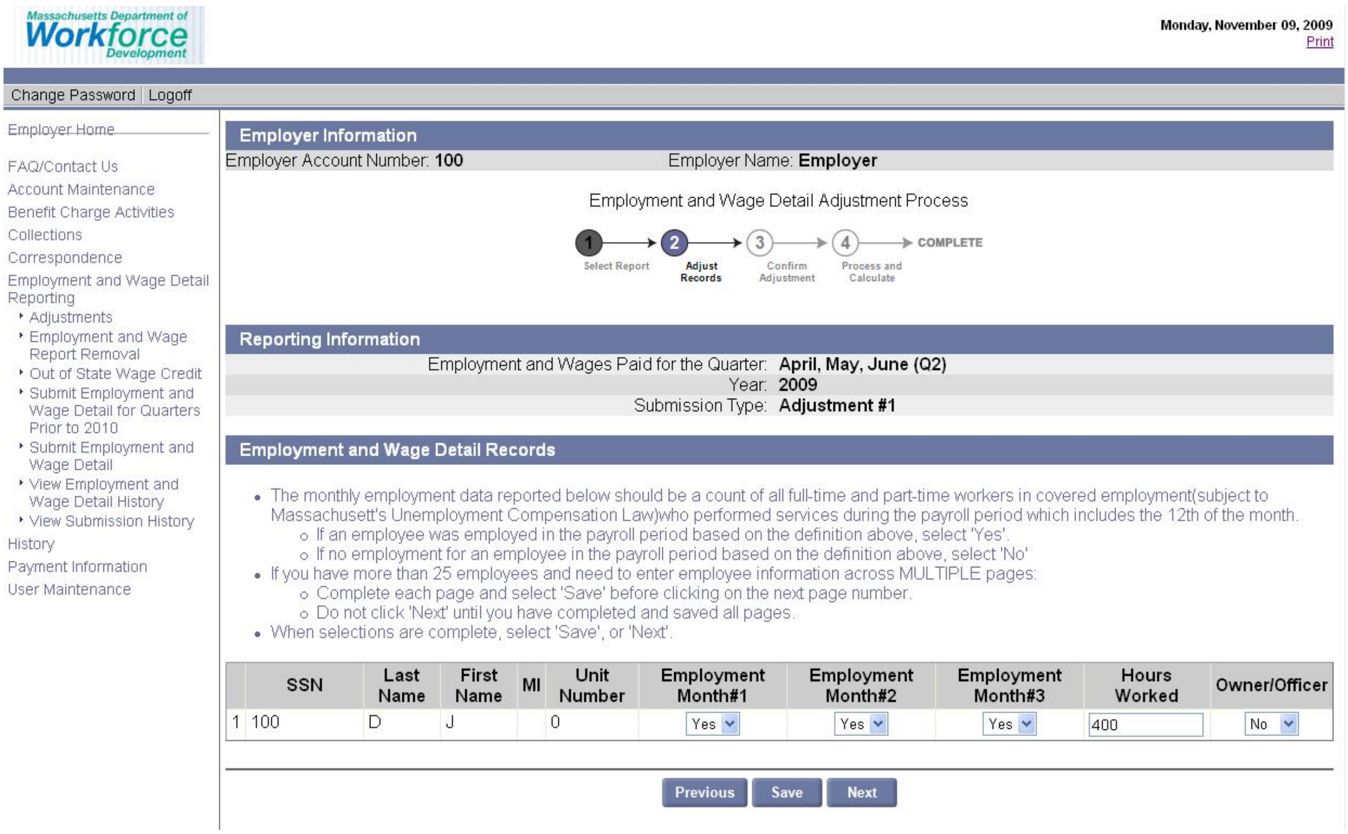
Sort Criteria

- To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.

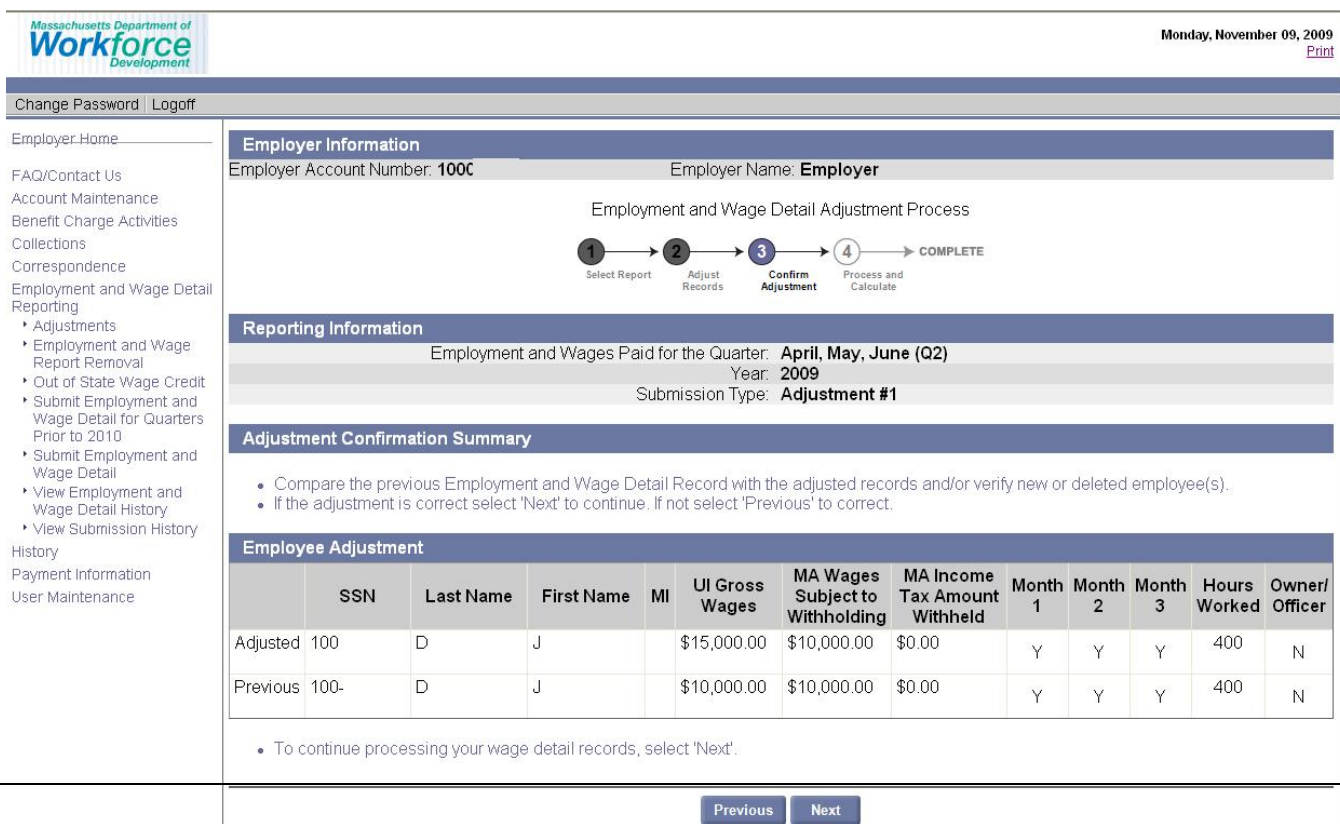
SSN: Last Name

Search | Reset

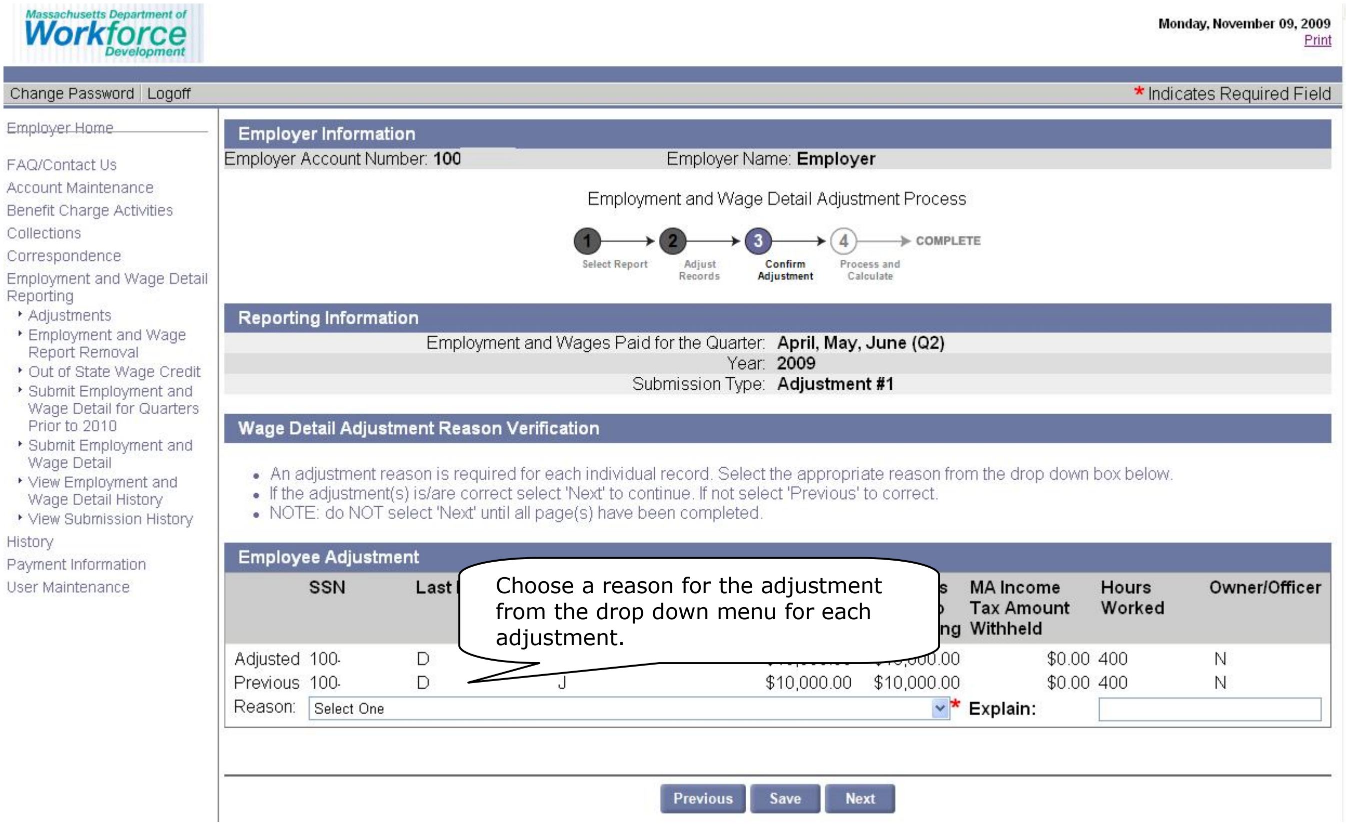
8. You will be asked to provide information on 12th of the month employment data for each wage detail record on the next page. Upon completion, click 'Next' to continue. NOTE: If required, please refer to the 'HOURS WORKED GUIDELINE' in the Addendum.



9. The following page will appear with the adjustment information. Click 'Next' to continue.



10. The screen shown below will appear, prompting you to provide a reason for each adjustment. Enter a reason and click ‘Next’.



11. On the next page, you will be asked to certify the adjustments you are making. Click the checkbox and click ‘Next’ to continue. Click ‘Previous’ to make changes.

12. The following page will appear displaying the recalculated contributions due after the adjustment.

Massachusetts Department of Workforce Development

Monday, November 09, 2009
Print

Change Password | Logoff

Employer Home

FAQ/Contact Us
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
- Adjustments
- Employment and Wage Report Removal
- Out of State Wage Credit
- Submit Employment and Wage Detail for Quarters Prior to 2010
- Submit Employment and Wage Detail
- View Employment and Wage Detail History
- View Submission History

History
Payment Information
User Maintenance

Employer Information

Employer Account Number: **100** Employer Name: **Employer**

Employment and Wage Detail Adjustment Process

1 Select Report → 2 Adjust Records → 3 Confirm Adjustment → 4 **Process and Calculate** → COMPLETE

Reporting Information

Employment and Wages Paid for the Quarter: **April, May, June (Q2)**
Year: **2009**
Submission Type: **Adjustment #1**

Employment and Wage Detail Adjustment Calculations

- The table below illustrates the adjustment's total affect by quarter
- Each line lists the most recently submitted amount, the adjusted submission amount and the difference
- IMPORTANT NOTE: The adjustment process recalculates the quarter adjusted and any subsequent quarters
- Calculations DO NOT include records pending UI staff review. These will be included in a new account statement

	Submission Type	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Amount
Quarterly Wages						
Total UI Gross Wages	Submitted		$10,000.00	$0.00		$10,000.00
	Adjusted		$15,000.00	$0.00		$15,000.00
	Difference		$5,000.00	$0.00		$5,000.00
UI Taxable Wages	Submitted		$10,000.00	$0.00		$10,000.00
	Adjusted		$14,000.00	$0.00		$14,000.00
	Difference		$4,000.00	$0.00		$4,000.00
UHI Taxable Wages	Submitted		$10,000.00	$0.00		$10,000.00
	Adjusted		$14,000.00	$0.00		$14,000.00
	Difference		$4,000.00	$0.00		$4,000.00
Contributions						
UI Contribution	Submitted		$283.00	$0.00		$283.00
	Adjusted		$396.20	$0.00		$396.20
	Difference		$113.20	$0.00		$113.20
UHI Contribution	Submitted		$0.00	$0.00		$0.00
	Adjusted		$0.00	$0.00		$0.00
	Difference		$0.00	$0.00		$0.00
Workforce Training Fund	Submitted		$6.00	$0.00		$6.00
	Adjusted		$8.40	$0.00		$8.40
	Difference		$2.40	$0.00		$2.40
Secondary Uniform Adjustment	Submitted		$0.00	$0.00		$0.00
	Adjusted		$0.00	$0.00		$0.00
	Difference		$0.00	$0.00		$0.00
Penalties and Interest						
Non Filer Penalty	Submitted		$100.00	$0.00		$100.00
	Adjusted		$100.00	$0.00		$100.00
	Difference		$0.00	$0.00		$0.00
Interest	Submitted		$9.31	$0.00		$9.31
	Adjusted		$13.44	$0.00		$13.44
	Difference		$4.13	$0.00		$4.13
Quarterly Amount Due	Submitted		$398.31	$0.00		$398.31
	Adjusted		$518.04	$0.00		$518.04
	Difference		$119.73	$0.00		$119.73

Previous | Submit

13. Click ‘Submit’ to complete the wage details adjustment if you are satisfied with the calculations. Otherwise click on ‘Previous’ to make any changes. A confirmation page will be displayed, indicating hat the process is complete. The confirmation page will also display a confirmation number which you can use for future inquiries.

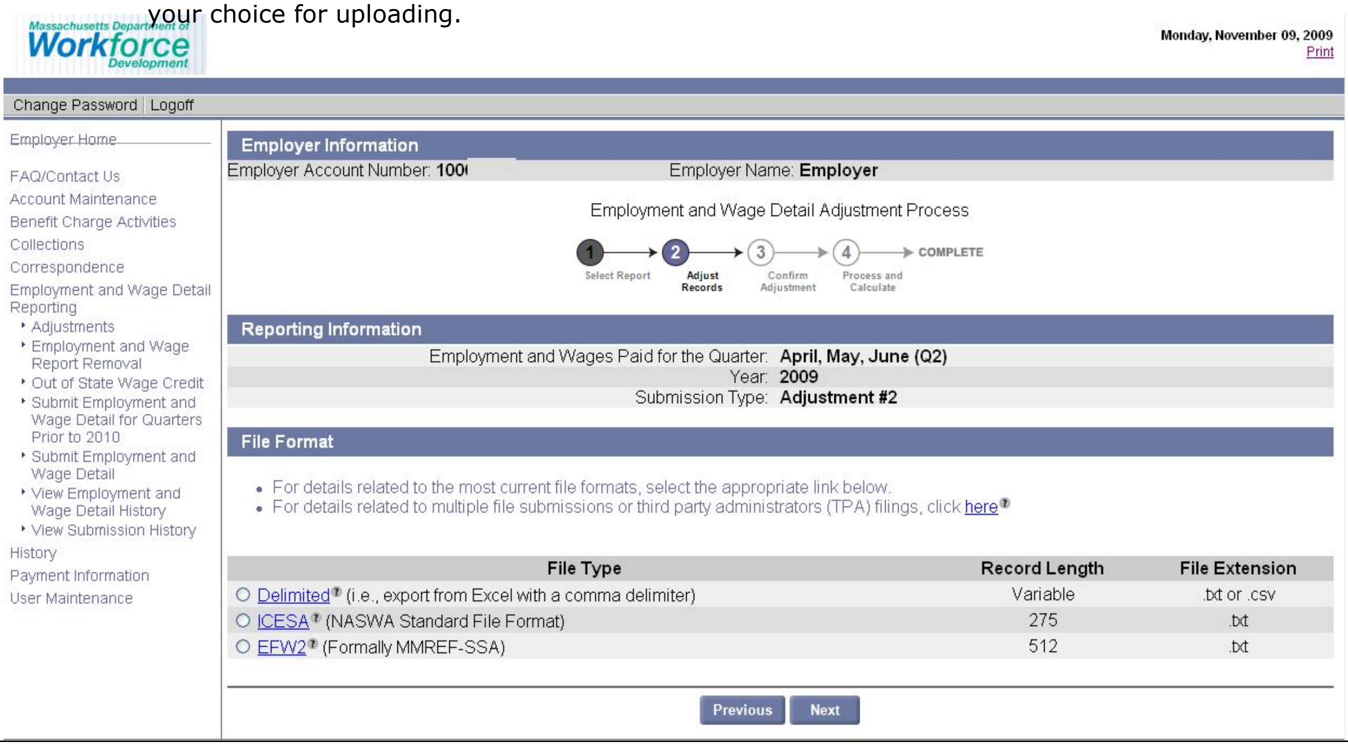
File Upload Method:

This method allows employers to submit information via a self service application. The file upload method should be used, whenever there are more than 100 records (the upper limit for manual entry). However, this method can also be used to process a lesser number of records. Within the file upload method, 3 options are available. They are: ICESA, EFW2 and Delimited. Key facts about file upload method are:

- The file upload method can be used to process up to 10,000 records. If you have more than 10,000 records, the FTP method should be used.
- The uploaded wage detail files would be processed immediately, if your file size is within 200 records. Otherwise, your file would be processed as part of a scheduled batch. You should be able to view the status of your submission the following day, using the link ‘ View Submission History’.
- The process to upload files using ICESA, EFW2 or Delimited is similar with the only difference being in the file format. Please refer to the addendum for additional information and extensive detail on file format, data definitions, formatting and file generation instructions for each of these formats.
- The file upload method for adjustments is the same as the one used to submit employment and wage detail records. The system differentiates between a submission and an adjustment using the value of a flag set at each record level. Please refer to the addendum for guidelines and information on employment and wage detail uploads.

Step by Step Instructions: For the purposes of this illustration the ‘Delimited’ option will be used. The step by step instructions to process ICESA and EFW2 files would be the same, except for the file formats. In order to use this delimited option, the data that needs to be uploaded should be in the form of a comma delimited text file. The delimited file should look like the screen shot below (only one record shown for a sample).

1. Follow the first 4 steps outlined in the ‘Manual Entry’ method. Choose the ‘File Upload’ option as your method of adjustment. The following screen will appear, prompting you to select the file format of your choice for uploading.



2. On the next screen choose ‘Delimited’ as your option and click ‘Next’.
3. On the next screen, follow the prompts to upload the file from your desktop and click ‘Next’.
4. If the file upload is successful, a confirmation will be displayed along with the first 10 rows of data from the uploaded file. If errors are found in the file, the errors will be displayed. You will not be able to upload the file until all the errors are fixed on the text file.

NOTE: If you uploaded more than 200 records, the process will end here, with a message that your file will be processed in the batch process. You will be able to check the process status in the submission history.

5. Proceed to step 12 of the ‘ Manual Entry’ process for adjustments to continue with the instructions.

FTP Method:

The secure FTP processes provide employers with extremely larger amounts of data (over 10,000 records) a method to submit information via an FTP folder. Special set-up is required for FTP submitters with secure access to individual employer folders. Data will be processed in over-night batch and acknowledgement files will be provided in separate FTP folder on the next day for review. Submission and error history will also be viewable online by logging onto the self-service application.

Please refer to the following sections of the addendum on details for setting up the FTP method.

- Employment and Wage Submission Guidelines and Information
- Delimited File Format Specification
- ICSE File Format Specification
- EFW2 File Format Specification

SUBMIT EMPLOYMENT AND WAGE DETAIL FOR QUARTERS PRIOR TO 2010

Introduction	This section of the document will show how an authorized user can submit an employment and wage detail report for quarters prior to 2010. Prior to 2010, employers are responsible for two separate filings: DUA Contribution Report (i.e., DUA UI and UHI Gross Employment and Wages) and DOR Employment and Wage Detail. The data elements required for DUA filing are: Gross Wages, UI taxable wages, UHI taxable wages and gross 12th of the month employment data. The taxable wages submitted will be used to process and calculate the contribution due. For DOR filing, the user will submit wage detail at employee level, but it will not be used in the calculation of UI contributions due. The user will be able to submit both original and adjustment submissions using this function. The user will first be required to provide the gross employment and wages (i.e., DUA Contribution Report) and will then be prompted to provide the detail employment and wage information (i.e., DOR Wage Report). The system will allow employers to submit the employment and wage detail (i.e., DOR Wage Report) using the real-time online file upload or the manual entry filing method.

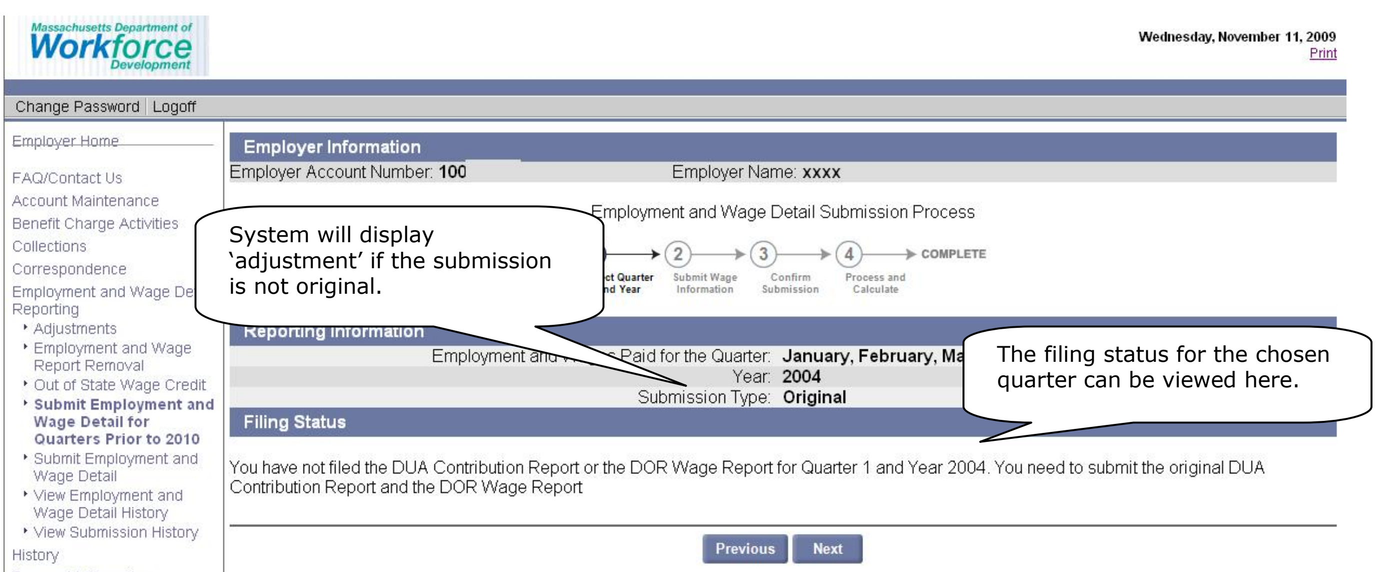
Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.

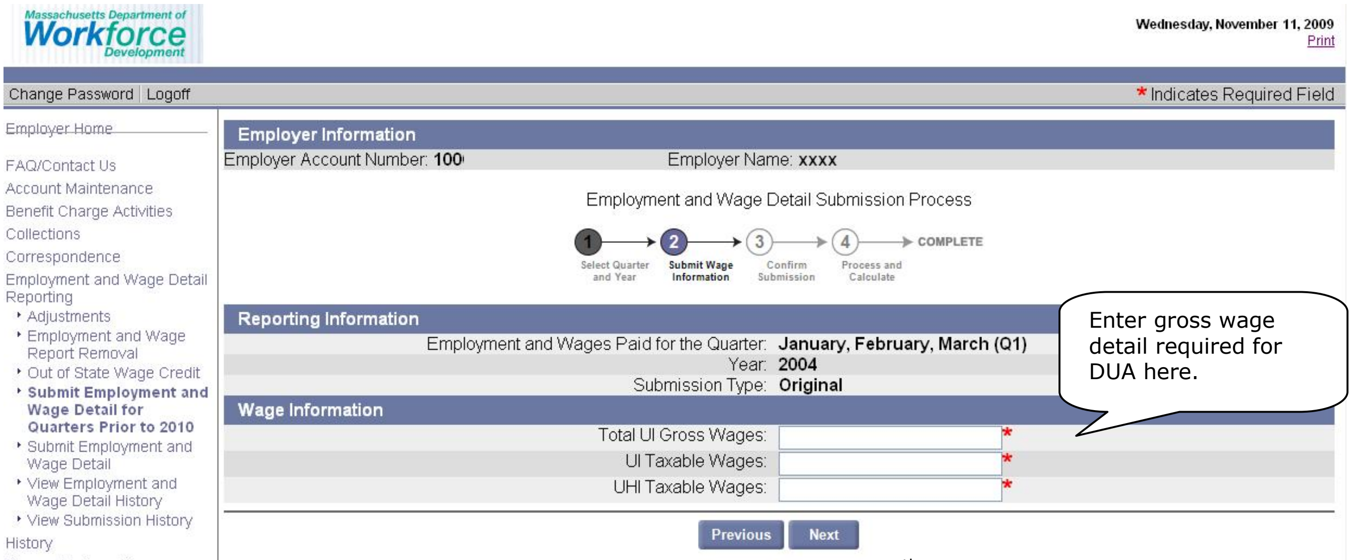
2. Click on the link 'Submit Employment and Wage Detail for Quarters prior to 2010'. You will be asked to choose the year and quarter for which you wish to file wages, using the drop down menus. After choosing, click 'Next'.

3. The following screen will appear with the filing status for the chosen year and quarter.

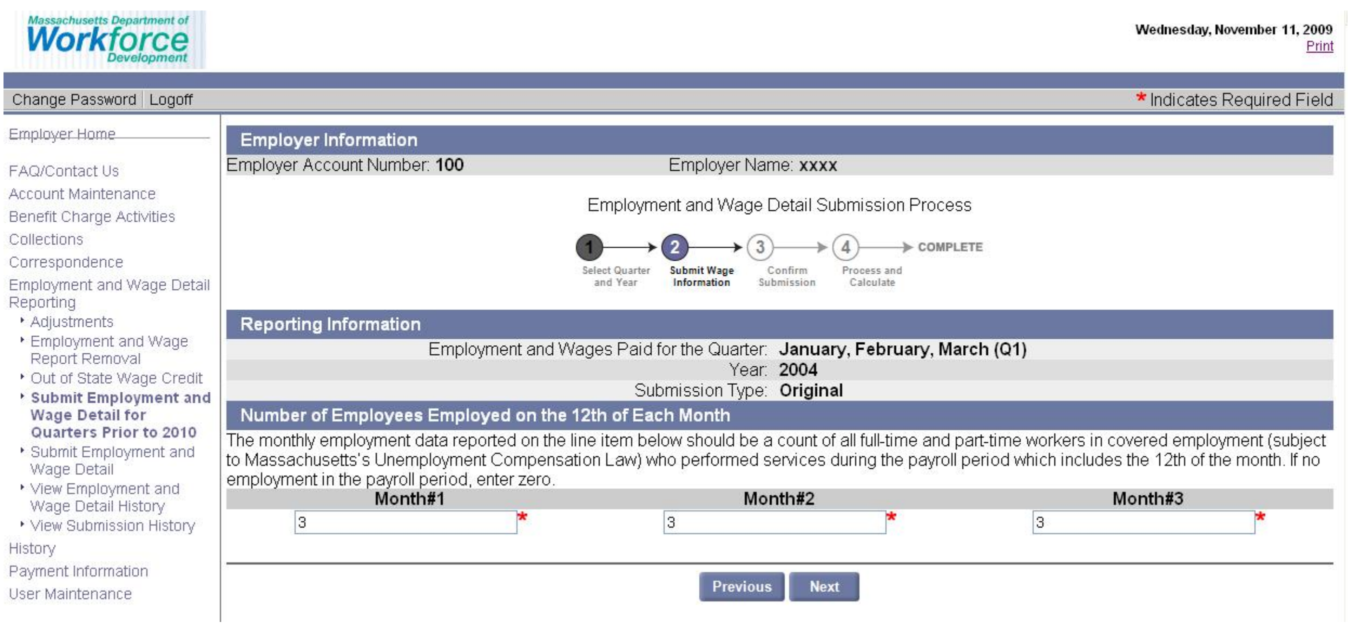
NOTE: The filing status will tell you whether the DUA Contribution Report and/or DOR Wage Report have been filed.



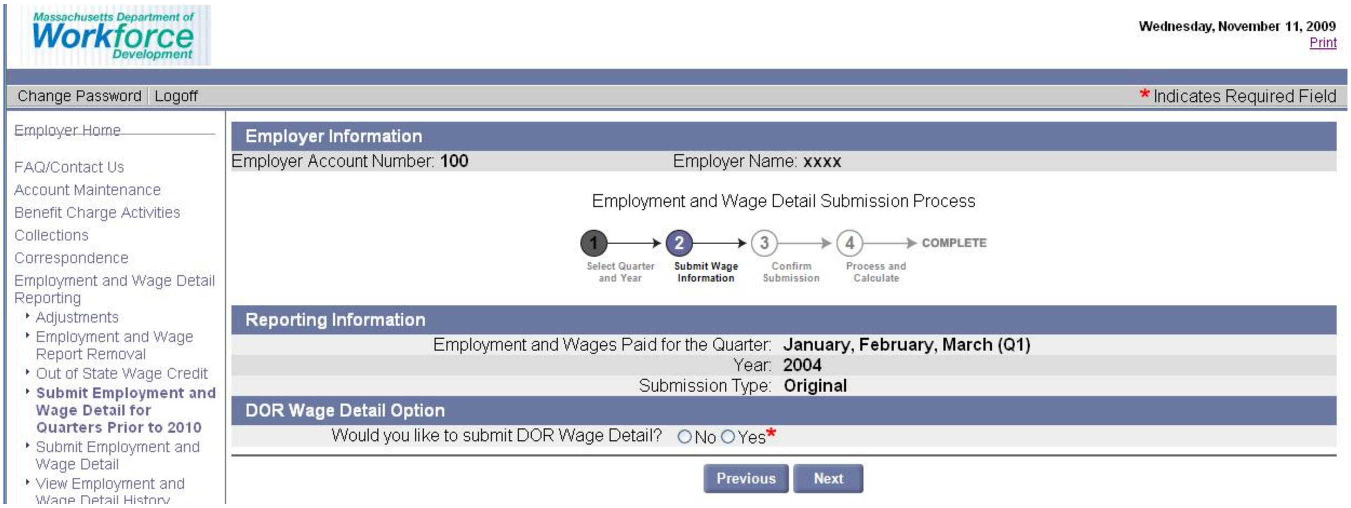
4. Click 'Next' to continue. The screen shown below will appear. Enter the information requested on the screen.



5. Click 'Next' to continue. On the following screen, enter the 12th of the month employment data.

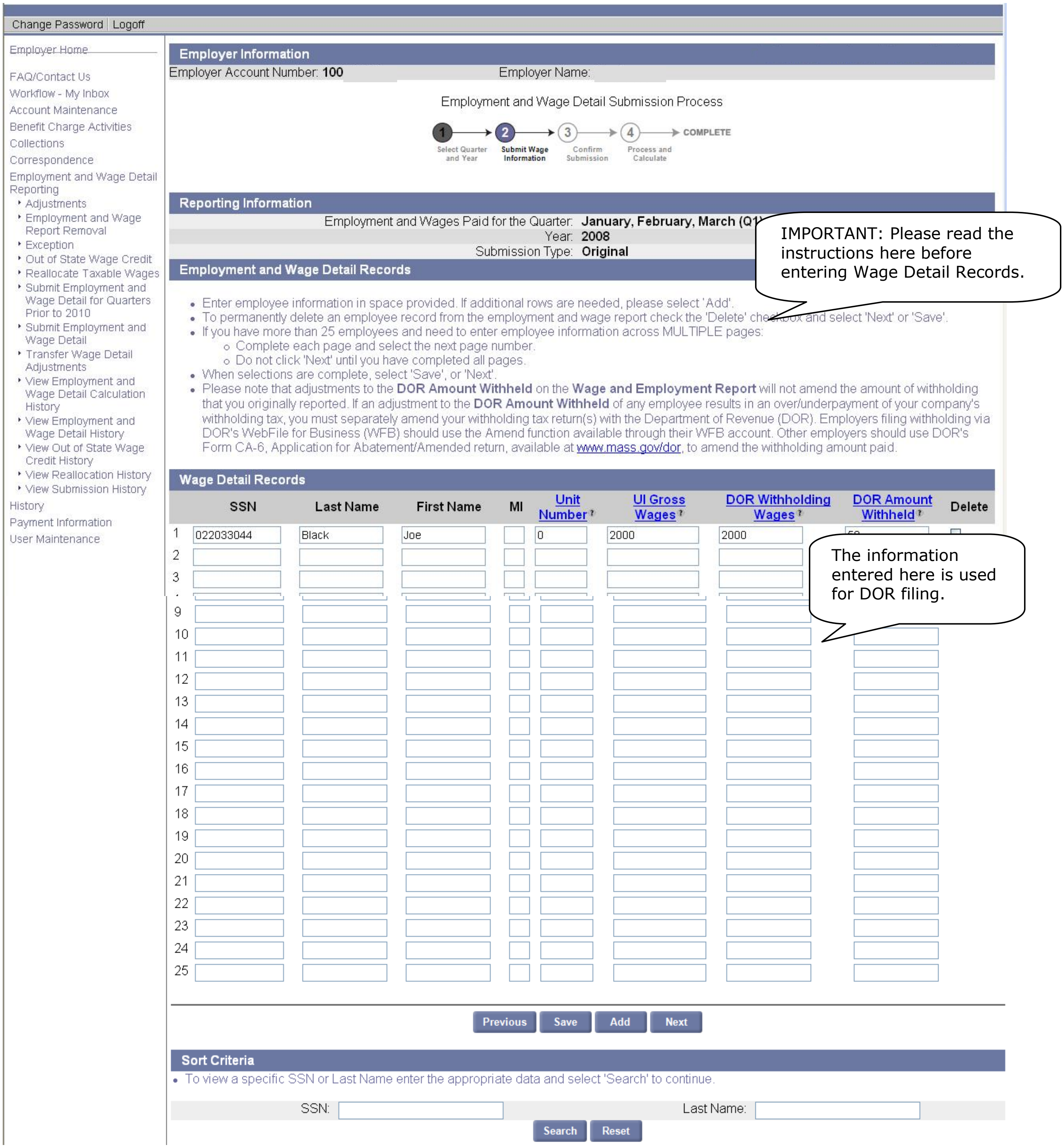


6. Click 'Next' to continue. You will be presented with a choice to enter the DOR wage detail. Choose 'Yes' to continue.



7. You will be asked to choose your method of filing for the DOR wage detail information. Choose from the 'Manual Entry' or 'File Upload'. If your choice is 'Manual Entry', the following screen will appear.

NOTE: If your choice is 'File Upload' in step 7, you will be guided through a series of screens to enter the wage detail information. Please refer to the section 'Submit Employment and Wage Detail Reports' for additional information on the File Upload method as well as the FTP method. However, the wage detail information you provide using the upload will not be used to calculate your UI, UHI contributions. The contributions will be calculated using the gross wage detail information you provided in steps 4 and 5.

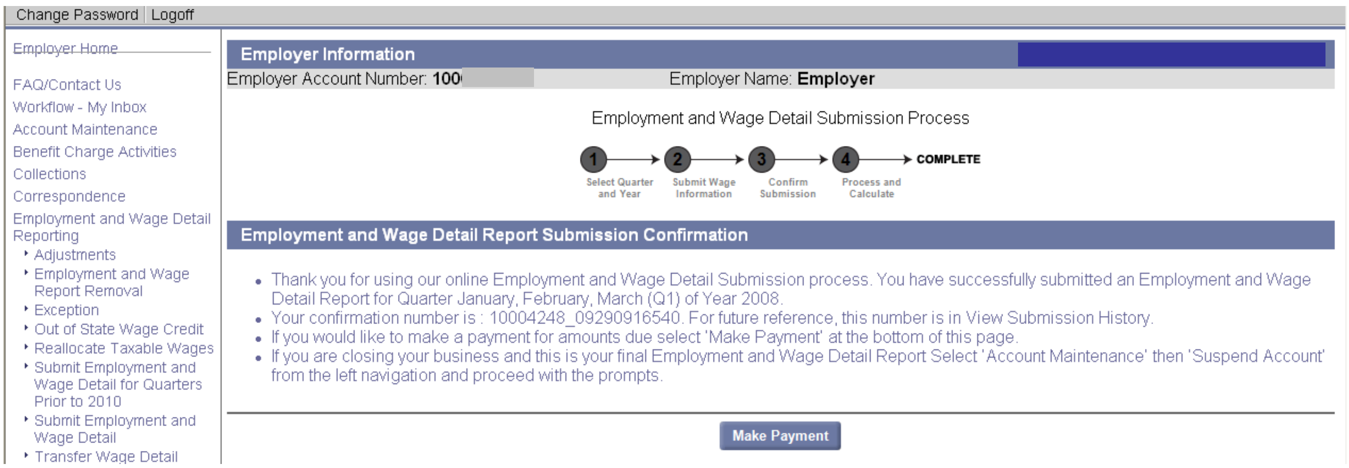

Change Password | Logoff
Employer Home
FAQ/Contact Us
Workflow - My Inbox
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
Adjustments
Employment and Wage Report Removal
Exception
Out of State Wage Credit
Reallocate Taxable Wages
Submit Employment and Wage Detail for Quarters Prior to 2010
Submit Employment and Wage Detail
Transfer Wage Detail Adjustments
View Employment and Wage Detail Calculation History
View Employment and Wage Detail History
View Out of State Wage Credit History
View Reallocation History
View Submission History
History
Payment Information
User Maintenance
Employer Information
Employer Account Number: 100
Employer Name:
Employment and Wage Detail Submission Process
1 Select Quarter and Year
2 Submit Wage Information
3 Confirm Submission
4 Process and Calculate
COMPLETE
Reporting Information
Employment and Wages Paid for the Quarter: January, February, March (Q1)
Year: 2008
Submission Type: Original
Employment and Wage Detail Records
Enter employee information in space provided. If additional rows are needed, please select 'Add'.
To permanently delete an employee record from the employment and wage report check the 'Delete' checkbox and select 'Next' or 'Save'.
If you have more than 25 employees and need to enter employee information across MULTIPLE pages:
Complete each page and select the next page number.
Do not click 'Next' until you have completed all pages.
When selections are complete, select 'Save', or 'Next'.
Please note that adjustments to the DOR Amount Withheld on the Wage and Employment Report will not amend the amount of withholding that you originally reported. If an adjustment to the DOR Amount Withheld of any employee results in an over/underpayment of your company's withholding tax, you must separately amend your withholding tax return(s) with the Department of Revenue (DOR). Employers filing withholding via DOR's WebFile for Business (WFB) should use the Amend function available through their WFB account. Other employers should use DOR's Form CA-6, Application for Abatement/Amended return, available at www.mass.gov/dor, to amend the withholding amount paid.
Wage Detail Records
SSN
Last Name
First Name
MI
Unit Number
UI Gross Wages
DOR Withholding Wages
DOR Amount Withheld
Delete
1
022033044
Black
Joe
0
2000
2000
2
3
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
Previous
Save
Add
Next
Sort Criteria
To view a specific SSN or Last Name enter the appropriate data and select 'Search' to continue.
SSN:
Last Name:
Search
Reset
IMPORTANT: Please read the instructions here before entering Wage Detail Records.
The information entered here is used for DOR filing.

8. Continue to click ‘Next’ and provide requested information. The steps will be similar to the manual entry method from the section, ‘Submit Employment and Wage Detail Report’.

9. Towards the end of the process, you will be presented with the quarterly calculations, as shown in the screen below. Please note that the calculations shown here are based only on the gross wages entered in 4 and 5. The wage detail information is not used for this calculation.

10. If you are satisfied with the calculations, click ‘Submit’ to continue. Otherwise, click ‘Previous’ to make any changes.

11. A confirmation page will appear as shown below.



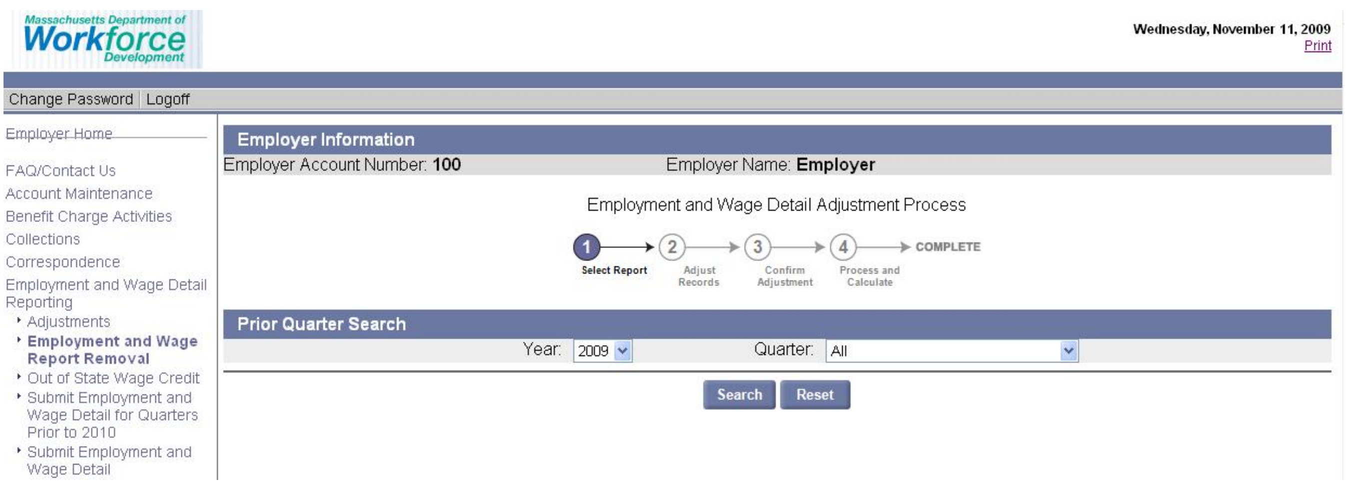
EMPLOYMENT AND WAGE REPORT REMOVAL

Introduction	This section of the user guide will show how an authorized user can remove previously submitted employment and wage detail records. The system provides the capability to remove erroneously submitted employment and wage detail records and using this option will delete the records completely for the chosen year/quarter. The removal will be treated as an adjustment and will be shown in the employment and wage detail submission history. After removing the incorrect wage detail report for a quarter, you will be able to enter wage details for the same quarter, using the standard submission process.

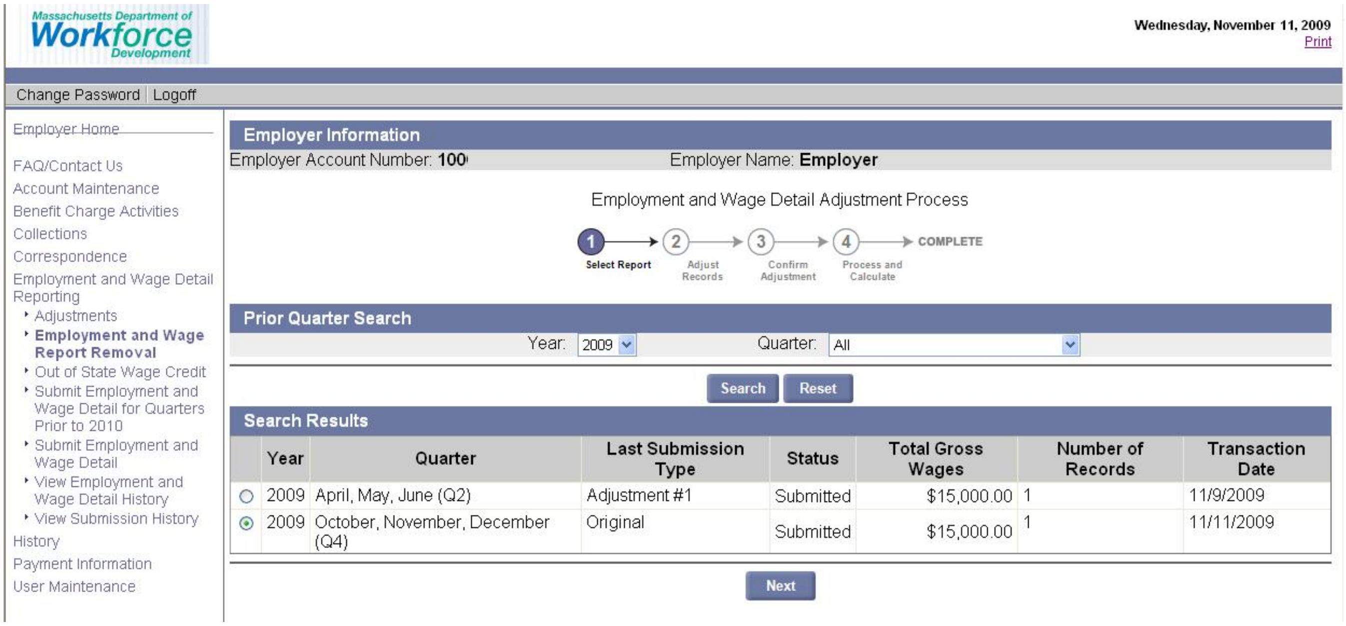
Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section – 'Navigating to Employment and Wage Detail Reporting'.

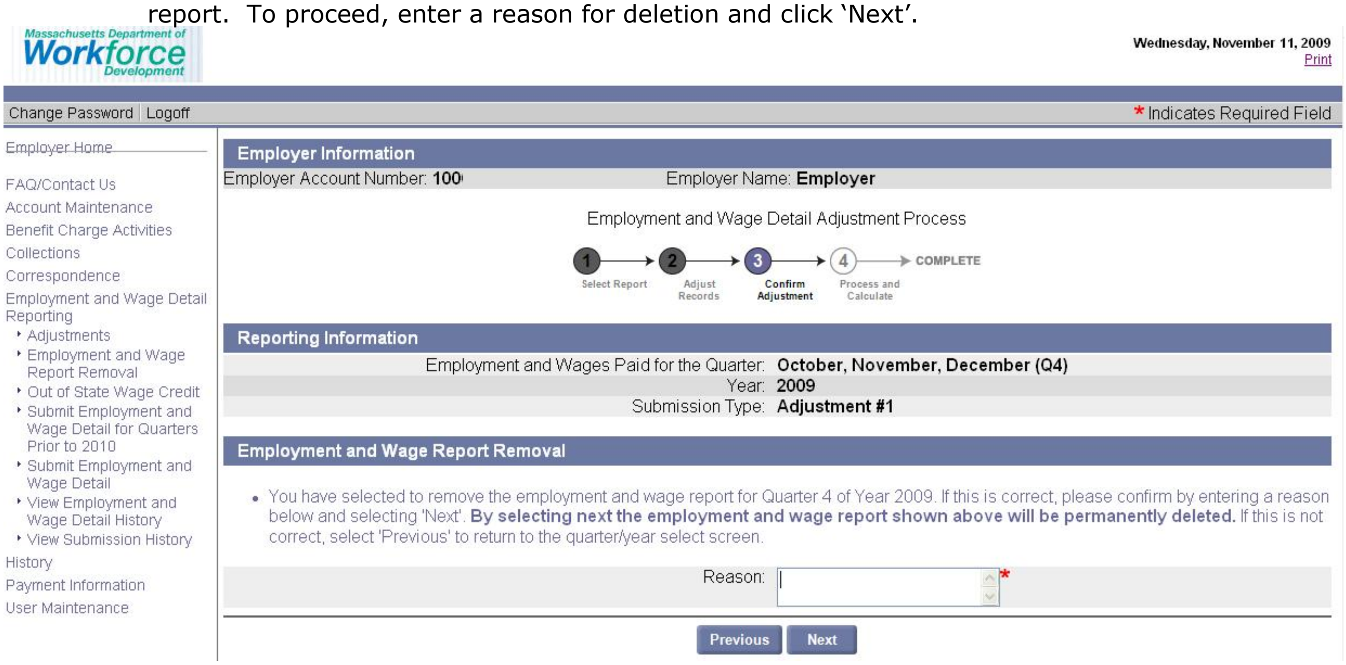
2. Click on the link 'Employment and Wage Report Removal'. The following screen will appear. Select the year and quarter(s) you wish to search for, using the drop down menus. Click on 'Search'.



3. The search results will display the list of existing wage detail records. Select the quarter you wish to remove the wage detail records, using the radio button. Click 'Next'.



4. The following screen will appear, displaying a message to verify your decision to remove the wage report. To proceed, enter a reason for deletion and click 'Next'.



5. On the next page, the details of the adjustment will be displayed, indicating a reversal of the charges from the original submission. Click 'Submit' to proceed with the removal.

6. A confirmation number will be displayed, indicating that the process completed successfully.

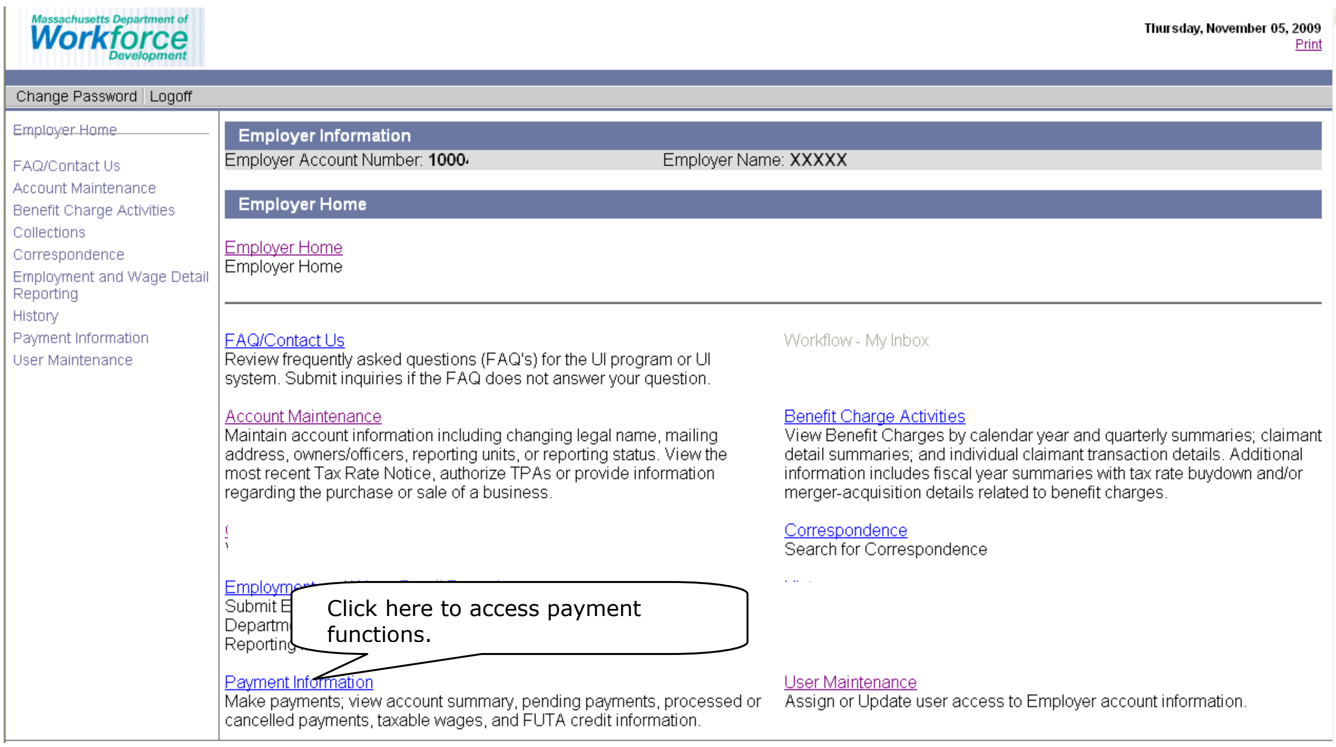
Payment Information

NAVIGATING TO PAYMENTS

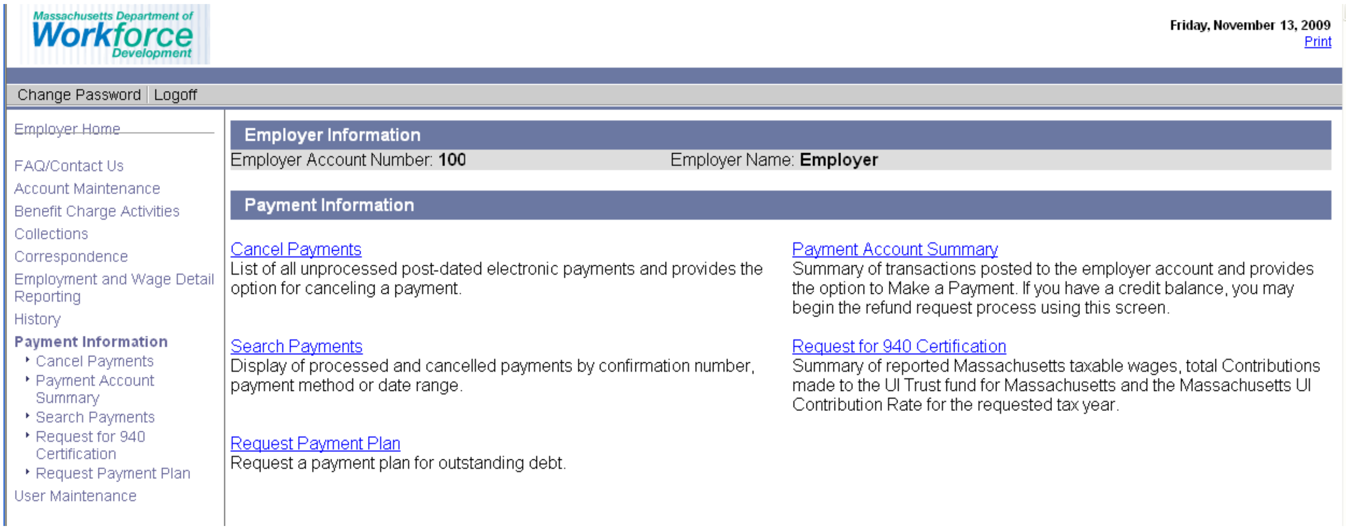
Introduction	This section of the document will explain how an authorized user can navigate to the employment and wage detail functions.

Step-by-Step Instructions:

1. While logged into the employer home page, click on link 'Payment Information'



2. The following page will appear, listing the available functions. Click on the corresponding link to access a function.



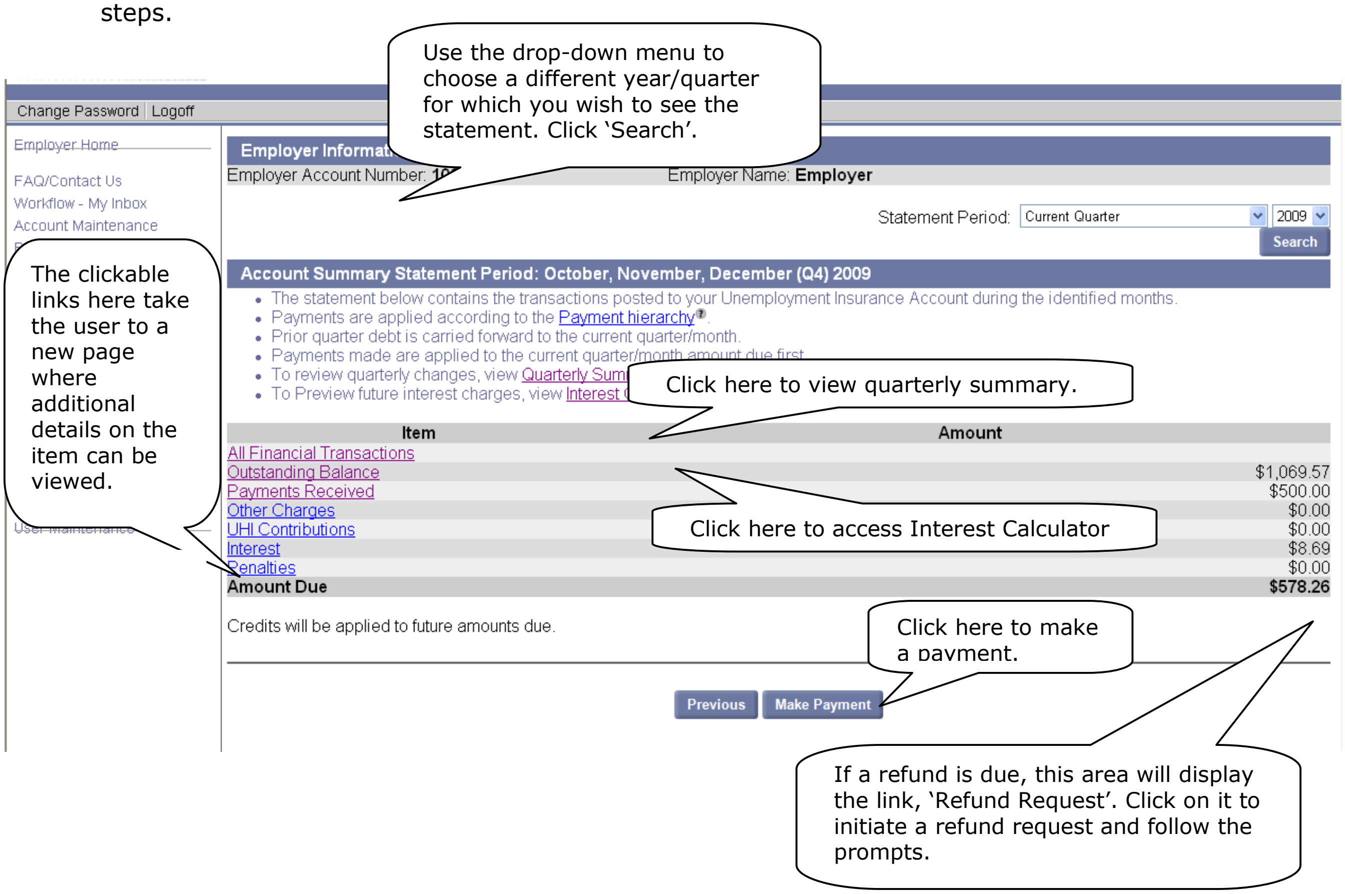
If	Then
You are unable to locate the required maintenance function	You may not have the sufficient privileges to perform this function. Contact your system administrator.

PAYMENT ACCOUNT SUMMARY

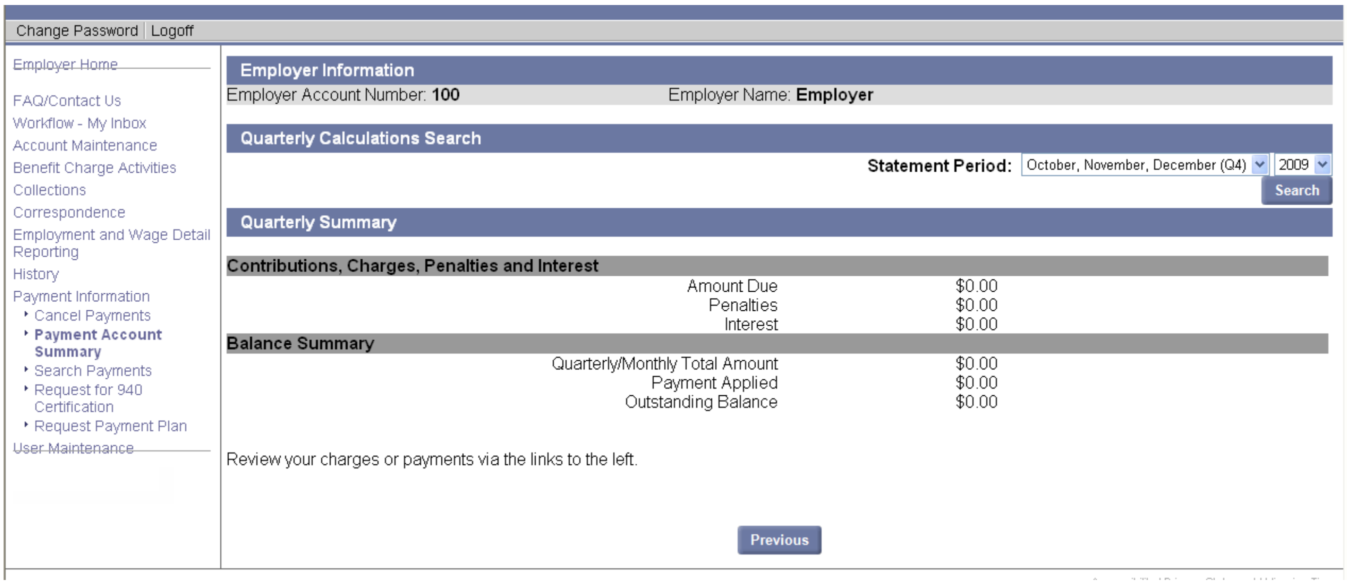
Introduction	This section of the document will show how an authorized user can view the payment account summary for an employer account. The payment account summary provides the previous balance, summary of activity during the quarter specified, and total balance due, for the chosen year/quarter. The user can also make payments and initiate refund requests from this screen. NOTE: If you wish to setup payments using ACH Credit method, please go to www.mass.gov/uima for additional information or contact the DUA.
Helpful Hints	Payments are applied according to the Payment hierarchy.

Step-by-Step Instructions:

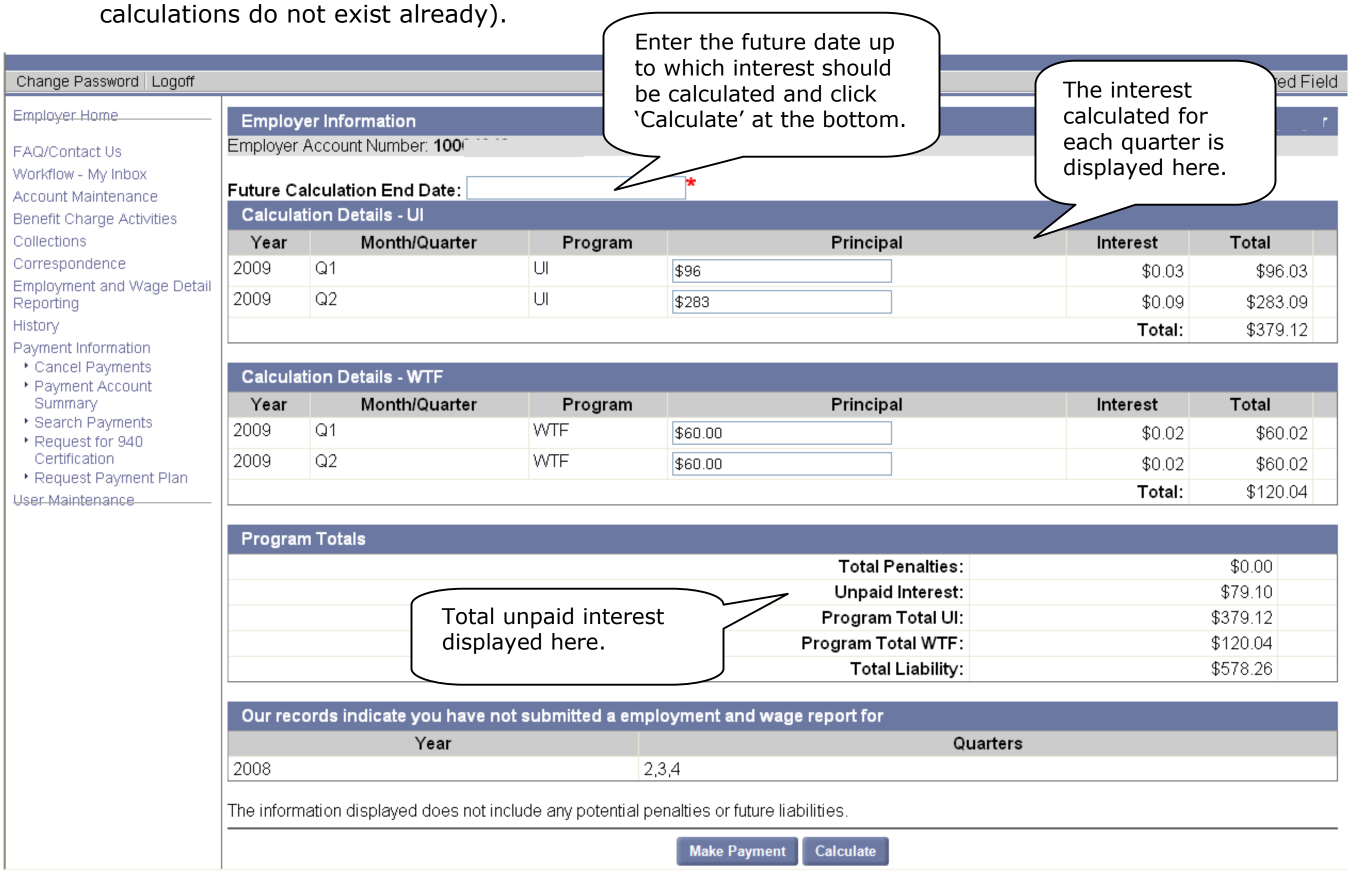
1. Navigate to the payment home page, using the instructions in the section - 'Navigating to Payments'.
2. Click on the link 'Payment Account Summary'. The account statement will be displayed along with the payments due for the current quarter (as shown below). The current statement includes balances from all prior quarters. From here you can perform additional actions as described in the subsequent steps.



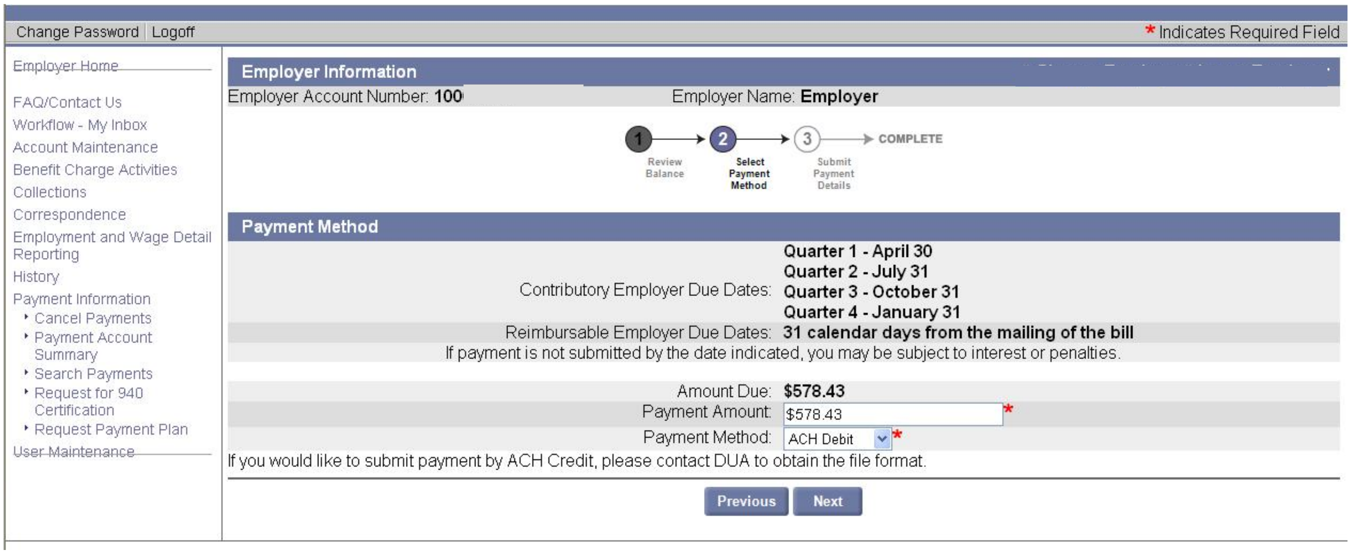
3. **Viewing Quarterly Summary**: The quarterly summary page can be viewed using the link shown in step two. The page will appear as shown below. This provides a summary view of contributions, payments etc. due for chosen quarter only. The difference from the account summary statement is that it does not include balances due from previous quarters.



4. **Interest Calculator**: The interest calculator can be accessed as shown in step two. The page will appear as shown below. On this screen, the user will be able to calculate the interest due on all outstanding balances. (Interest cannot be calculated for a past/future quarter for which contribution calculations do not exist already).

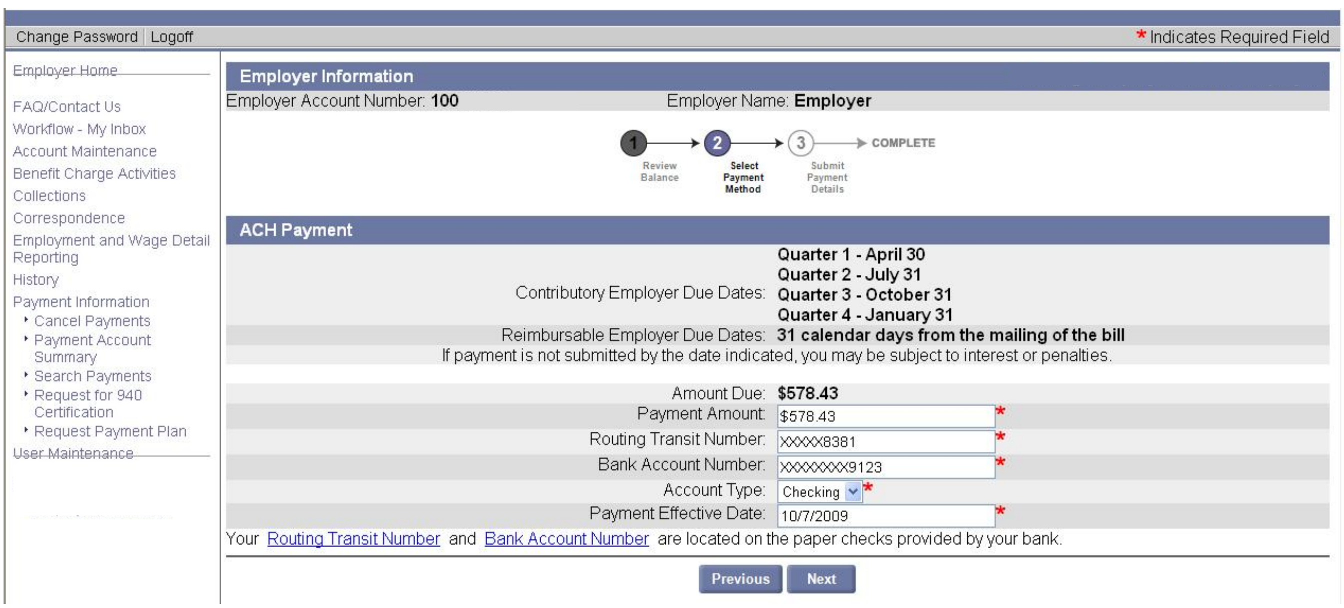


5. **Making a payment**: The 'Make Payment' screen can be accessed as shown in step two. Upon clicking 'Make Payment', the following screen will appear. On this screen, enter a payment amount and choose the payment method.



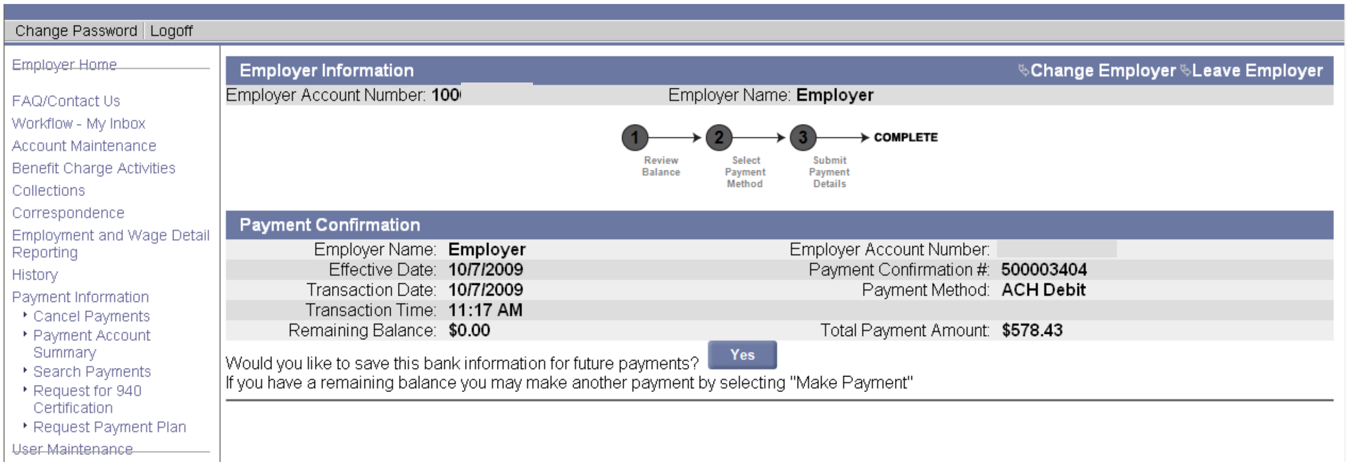
6. Click 'Next'. If the payment method chosen in the previous step is ACH Debit, continue to the next step, otherwise proceed to step 11 for instructions on making the payment using a paper check.

7. The screen shown below will appear. Enter the bank routing number, account number/type and payment effective date.



8. Click 'Next' to continue. You will be prompted to verify the information entered so far.

9. Click 'Submit' to confirm and the screen shown below will appear along with the payment confirmation number. The payment confirmation number can be used as a reference for future queries/adjustments on the payment.



10. On the above screen, you will be asked if you wish to save the bank information for future transactions. Click 'Yes' to review saved bank data, otherwise, your payment is complete.

11. In order to make a payment by paper check, choose the payment method as 'Paper Check' in step 5 and click 'Next'.

12. The following screen will appear, displaying the voucher to be sent along with the paper check. Read and follow the instructions on the screen for sending the paper check.

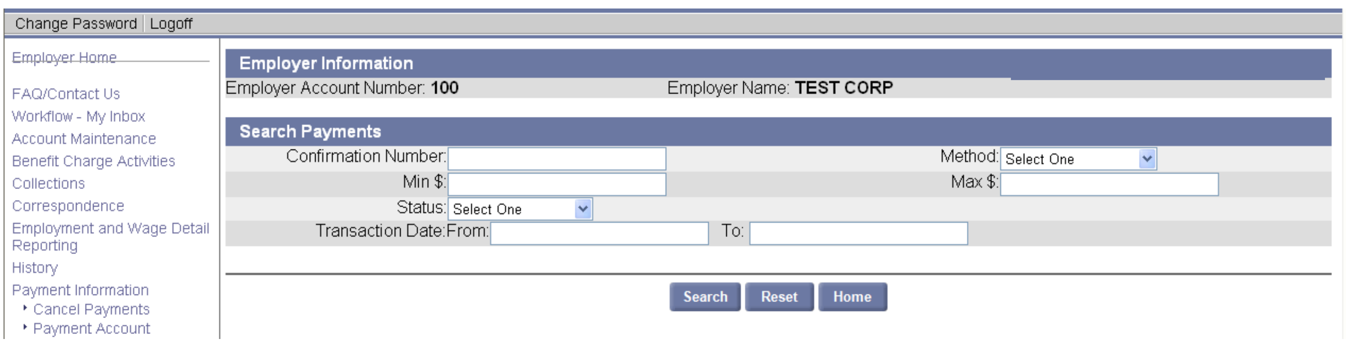
Read instructions here to send payment by paper check.

SEARCH PAYMENTS

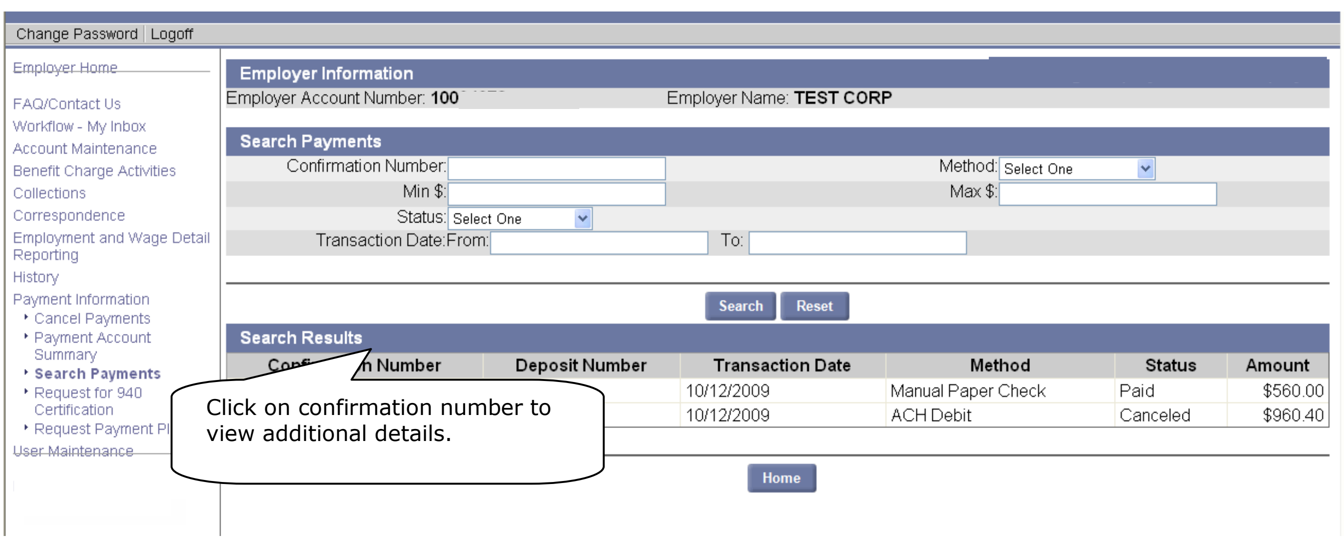
Introduction	This section will show how an authorized user can search and view payments on the employer account. From here, the user can view the payment status/details of all payments associated with the account.

Step-by-Step Instructions:

1. Navigate to the payment home page, using the instructions in the section - 'Navigating to Payments'.
2. Click on the link 'Search Payments'. The following screen will appear. If you would like to limit your search results by payment method, status, confirmation etc., enter your search criteria and click on 'Search'. If no search criterion is entered, all available payments for the employer account will be displayed.



3. The search results will appear as follows.

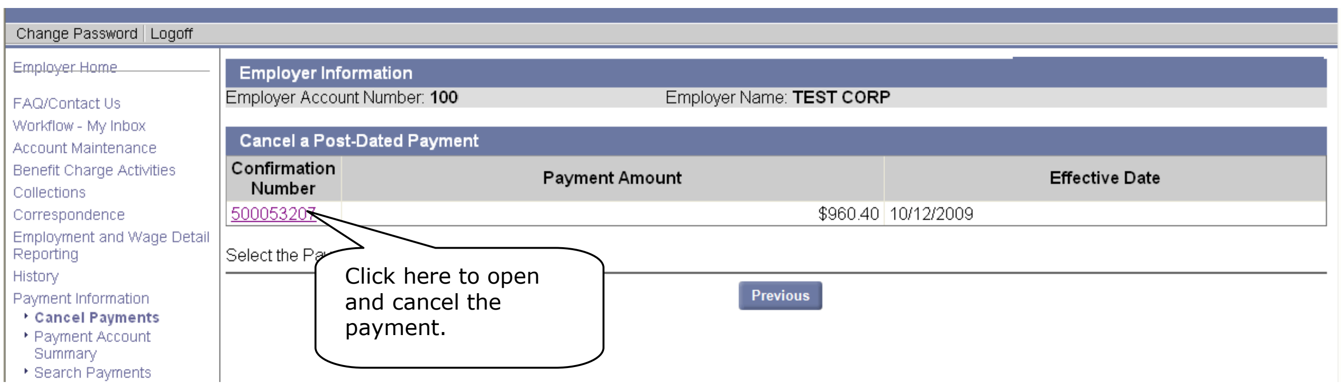


CANCEL PAYMENT

Introduction	This section of the document will show how an authorized user can cancel a payment in progress. Only payments that have not been processed completely can be canceled, i.e., the status of a payment must be 'Submitted' for it to be canceled. If a payment has already been processed it cannot be cancelled.

Step-by-Step Instructions:

1. Navigate to the payment home page, using the instructions in the section - 'Navigating to Payments'.
2. Click on 'Cancel Payments'. The following screen will appear, listing all unprocessed payments, eligible for cancellation. Click on the confirmation number.



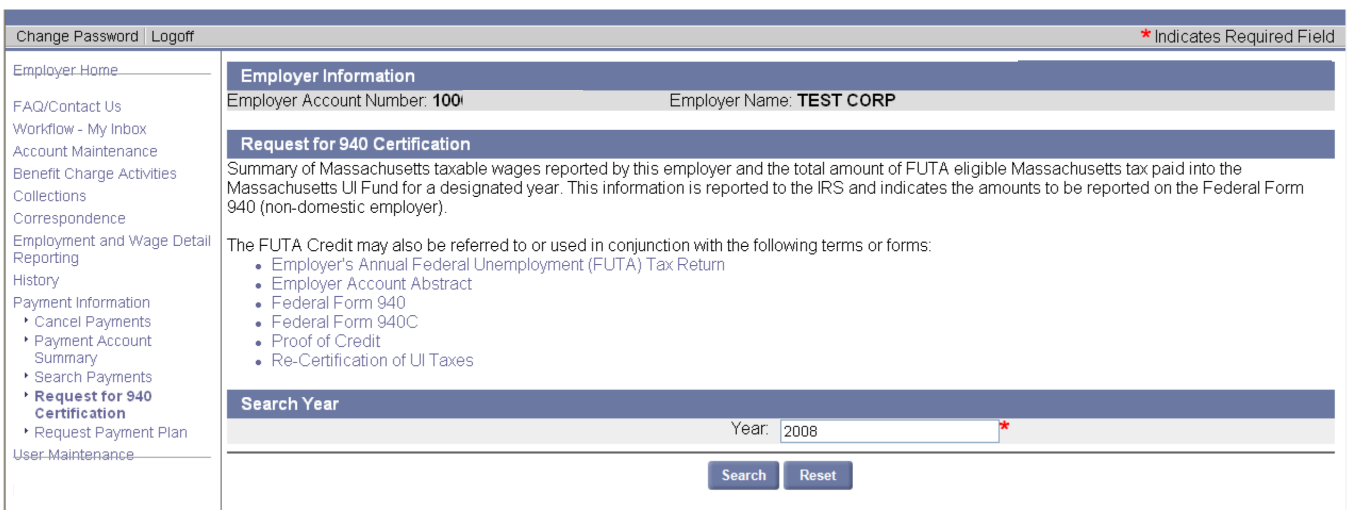
3. A page will appear where you will be prompted to enter your notes on the cancellation. Enter your notes and click on 'Submit'.
4. The following screen will appear confirming that the cancellation is complete.

REQUEST FOR 940 CERTIFICATION

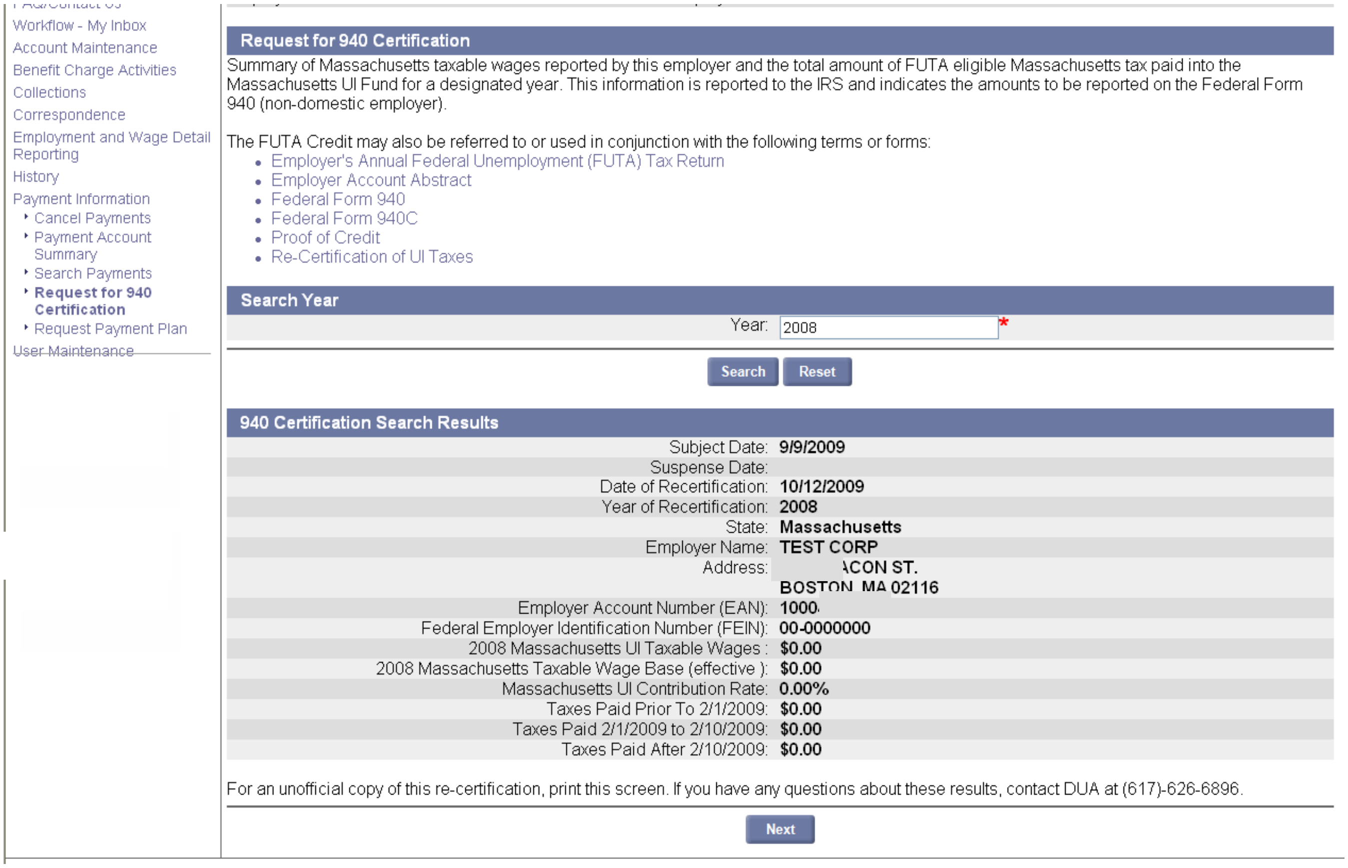
Introduction	This section of the document will show how an authorized user can request for 940 Certification for an employer account. 940 Certification provides a summary of Massachusetts taxable wages reported by an employer and the total amount of FUTA eligible Massachusetts tax paid into the Massachusetts UI Fund for a designated year. This information is used to report to the IRS and the system provides the capability of running this report on demand.

Step-by-Step Instructions:

1. Navigate to the payment home page, using the instructions in the section - 'Navigating to Payments'.
2. Click on the link 'Request for 940 Certification'. The following screen will appear.



3. Enter the year the 940 information is requested for. Click on 'Search'.
4. The following screen will appear, displaying the summary of Massachusetts taxable wages reported by the chosen employer for the designated year.



FAQ/Contact Us
Workflow - My Inbox
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
- Cancel Payments
- Payment Account Summary
- Search Payments
- **Request for 940 Certification**
- Request Payment Plan

User Maintenance

Request for 940 Certification

Summary of Massachusetts taxable wages reported by this employer and the total amount of FUTA eligible Massachusetts tax paid into the Massachusetts UI Fund for a designated year. This information is reported to the IRS and indicates the amounts to be reported on the Federal Form 940 (non-domestic employer).

The FUTA Credit may also be referred to or used in conjunction with the following terms or forms:
- Employer's Annual Federal Unemployment (FUTA) Tax Return
- Employer Account Abstract
- Federal Form 940
- Federal Form 940C
- Proof of Credit
- Re-Certification of UI Taxes

Search Year

Year: 2008 *

Search Reset

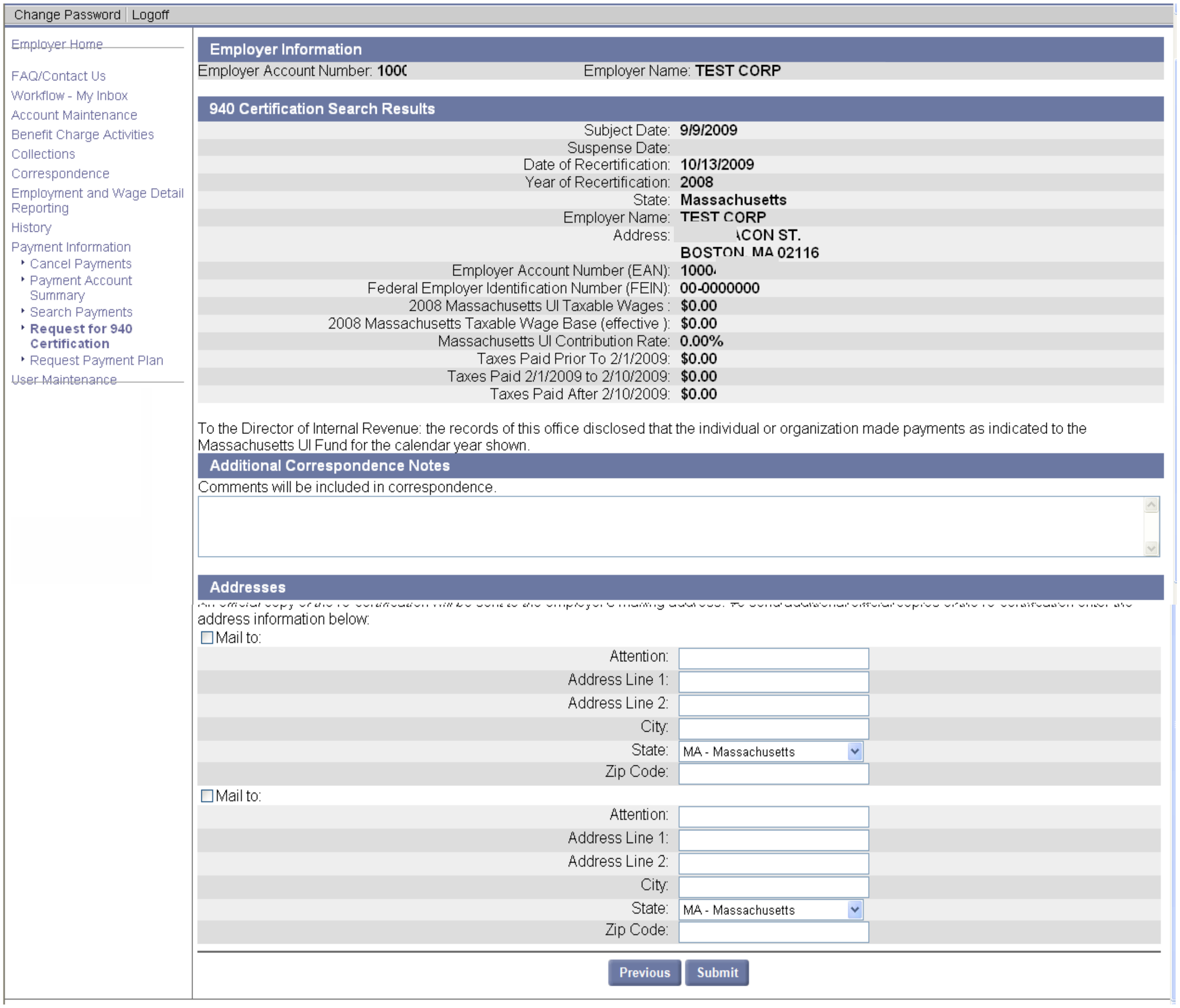
940 Certification Search Results

Subject Date:	9/9/2009
Suspense Date:	
Date of Recertification:	10/12/2009
Year of Recertification:	2008
State:	Massachusetts
Employer Name:	TEST CORP
Address:	ACON ST. BOSTON, MA 02116
Employer Account Number (EAN):	1000
Federal Employer Identification Number (FEIN):	00-0000000
2008 Massachusetts UI Taxable Wages :	$0.00
2008 Massachusetts Taxable Wage Base (effective):	$0.00
Massachusetts UI Contribution Rate:	0.00%
Taxes Paid Prior To 2/1/2009:	$0.00
Taxes Paid 2/1/2009 to 2/10/2009:	$0.00
Taxes Paid After 2/10/2009:	$0.00

For an unofficial copy of this re-certification, print this screen. If you have any questions about these results, contact DUA at (617)-626-6896.

Next

5. This screen can be printed for an unofficial copy. Click 'Next' to continue requesting an official copy. On the screen that appears (as shown in the next page), enter the addresses to which the official 940 Certification correspondence should be sent.



Change Password | Logoff

Employer Home
FAQ/Contact Us
Workflow - My Inbox
Account Maintenance
Benefit Charge Activities
Collections
Correspondence
Employment and Wage Detail Reporting
History
Payment Information
- Cancel Payments
- Payment Account Summary
- Search Payments
- **Request for 940 Certification**
- Request Payment Plan

User Maintenance

Employer Information

Employer Account Number: **100(** Employer Name: **TEST CORP**

940 Certification Search Results

Subject Date:	9/9/2009
Suspense Date:	
Date of Recertification:	10/13/2009
Year of Recertification:	2008
State:	Massachusetts
Employer Name:	TEST CORP
Address:	\CON ST. BOSTON, MA 02116
Employer Account Number (EAN):	1000
Federal Employer Identification Number (FEIN):	00-0000000
2008 Massachusetts UI Taxable Wages :	$0.00
2008 Massachusetts Taxable Wage Base (effective):	$0.00
Massachusetts UI Contribution Rate:	0.00%
Taxes Paid Prior To 2/1/2009:	$0.00
Taxes Paid 2/1/2009 to 2/10/2009:	$0.00
Taxes Paid After 2/10/2009:	$0.00

To the Director of Internal Revenue: the records of this office disclosed that the individual or organization made payments as indicated to the Massachusetts UI Fund for the calendar year shown.

Additional Correspondence Notes

Comments will be included in correspondence.

Addresses

address information below:

☐ Mail to:

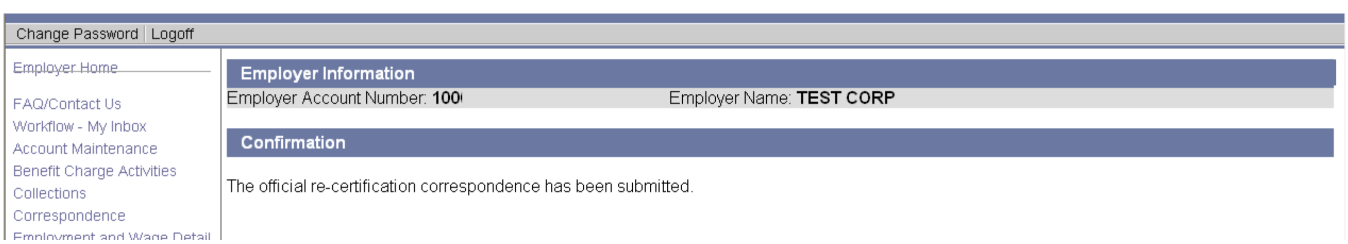
Attention:
Address Line 1:
Address Line 2:
City:
State: MA - Massachusetts
Zip Code:

☐ Mail to:

Attention:
Address Line 1:
Address Line 2:
City:
State: MA - Massachusetts
Zip Code:

Previous | Submit

6. Click on 'Submit' to complete the process and the following confirmation will appear.



Change Password | Logoff

Employer Home
FAQ/Contact Us
Workflow - My Inbox
Account Maintenance
Benefit Charge Activities
Collections
Correspondence

Employer Information

Employer Account Number: **100(** Employer Name: **TEST CORP**

Confirmation

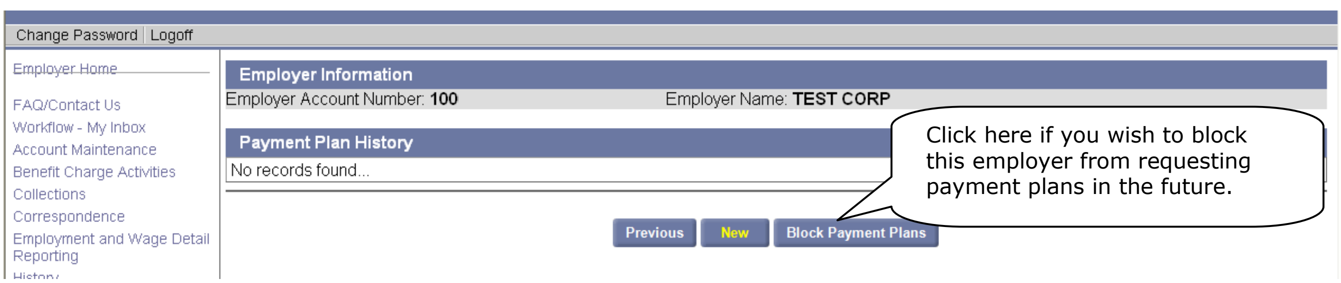
The official re-certification correspondence has been submitted.

REQUEST PAYMENT PLAN

Introduction	This section of the document will show how an authorized user can submit a request for payment plan. If an employer has outstanding debt and is unable to pay the full amount due, the employer can request for a payment plan. This will allow the employer to pay the debt in installments, though interest will continue to accrue. Upon submission of the request, authorized DUA staff will review the payment plan and approve or deny the request and you will be notified of the decision.

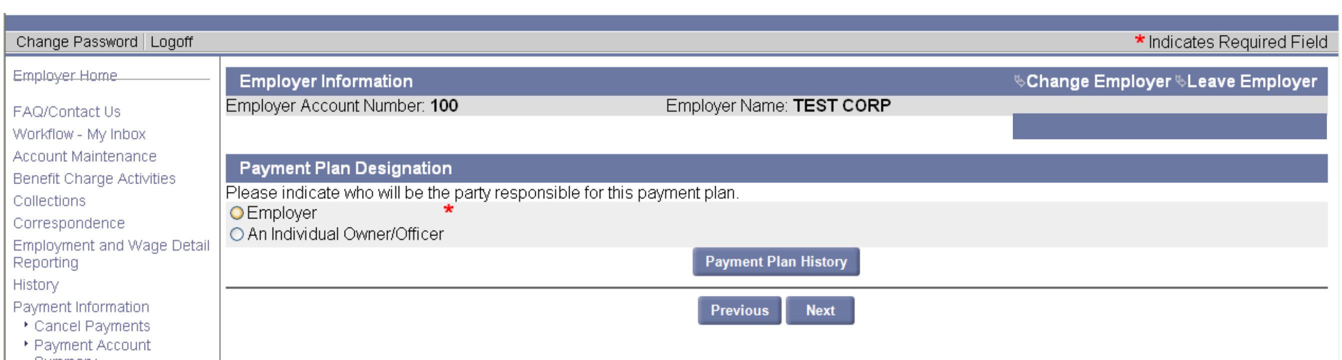
Step-by-Step Instructions:

1. Navigate to the payment home page, using the instructions in the section - 'Navigating to Payments'.
2. Click on the link 'Request Payment Plan'. The following page will appear. Click on 'New' to request a payment plan.

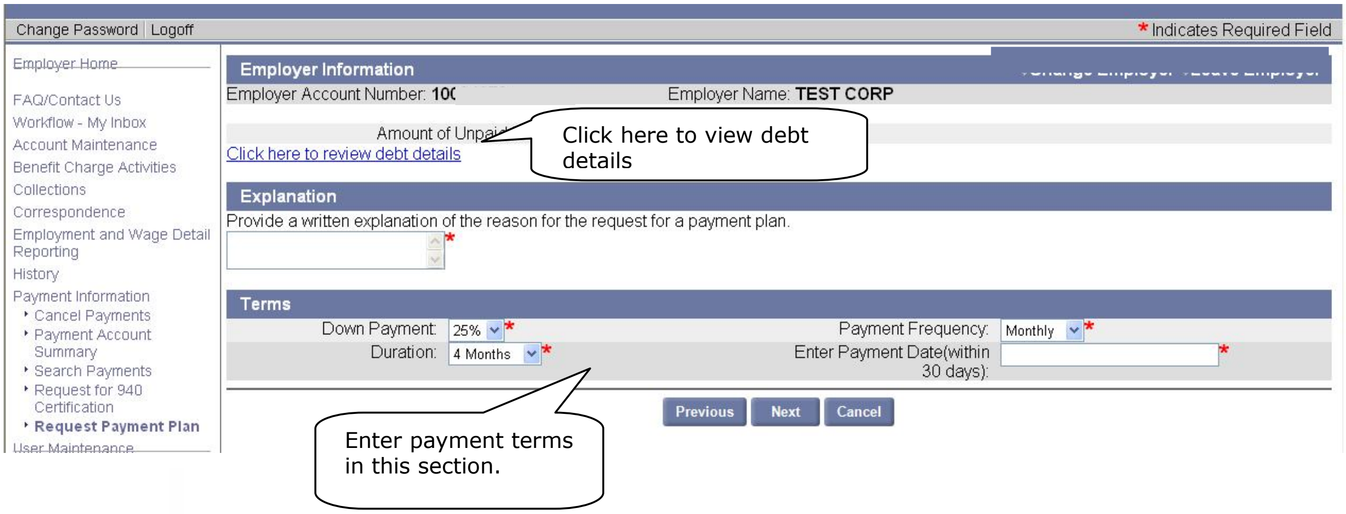


NOTE: Staff users also have the ability to block an employer from requesting payment plans. If you wish to do so, proceed to step 12.

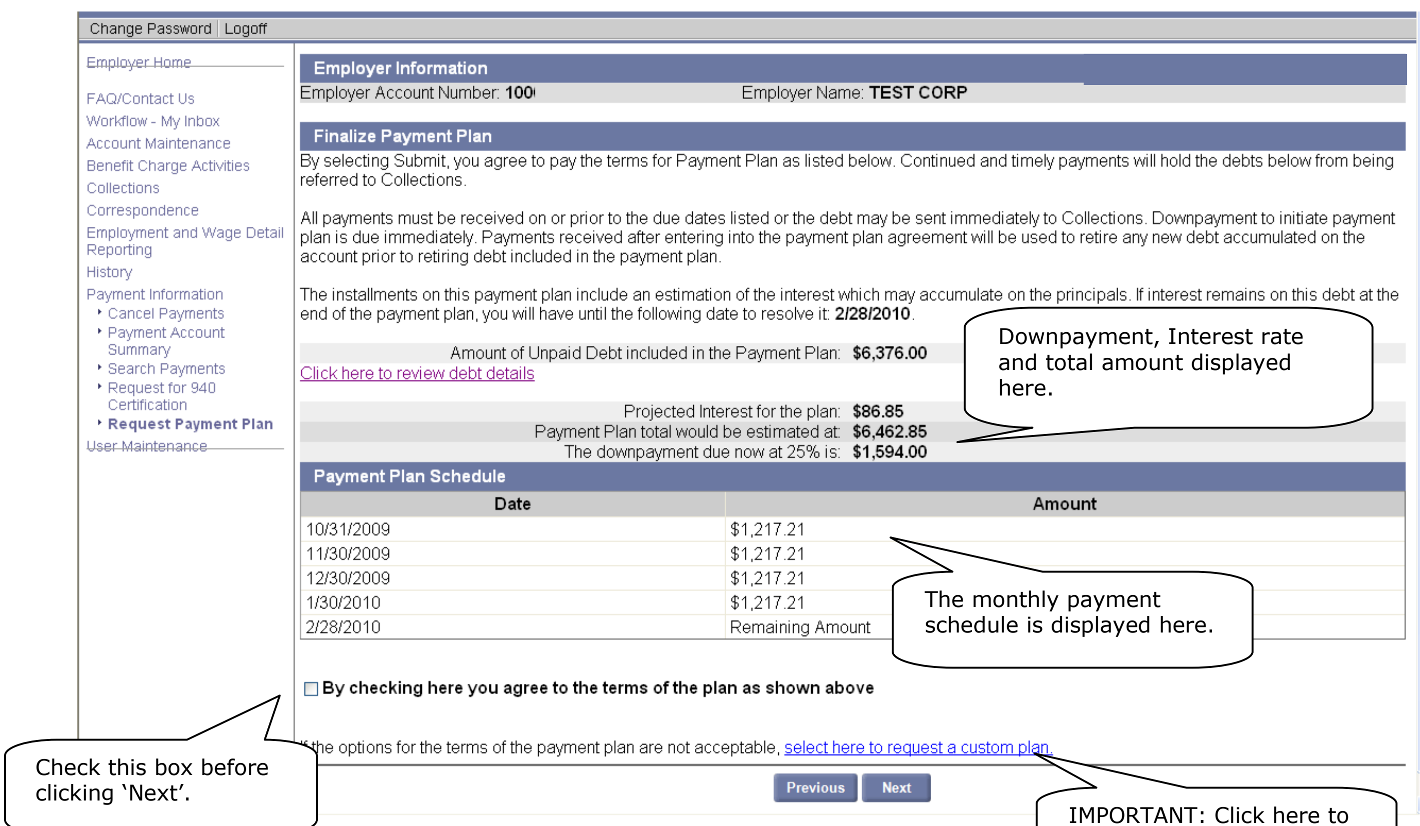
3. The following screen will appear. Select the requested information using the radio buttons and click 'Next' to continue.



4. The following screen will appear. Enter an explanation for the payment plan request and specify the payment terms as available in the drop-down menus. Click 'Next' to continue.

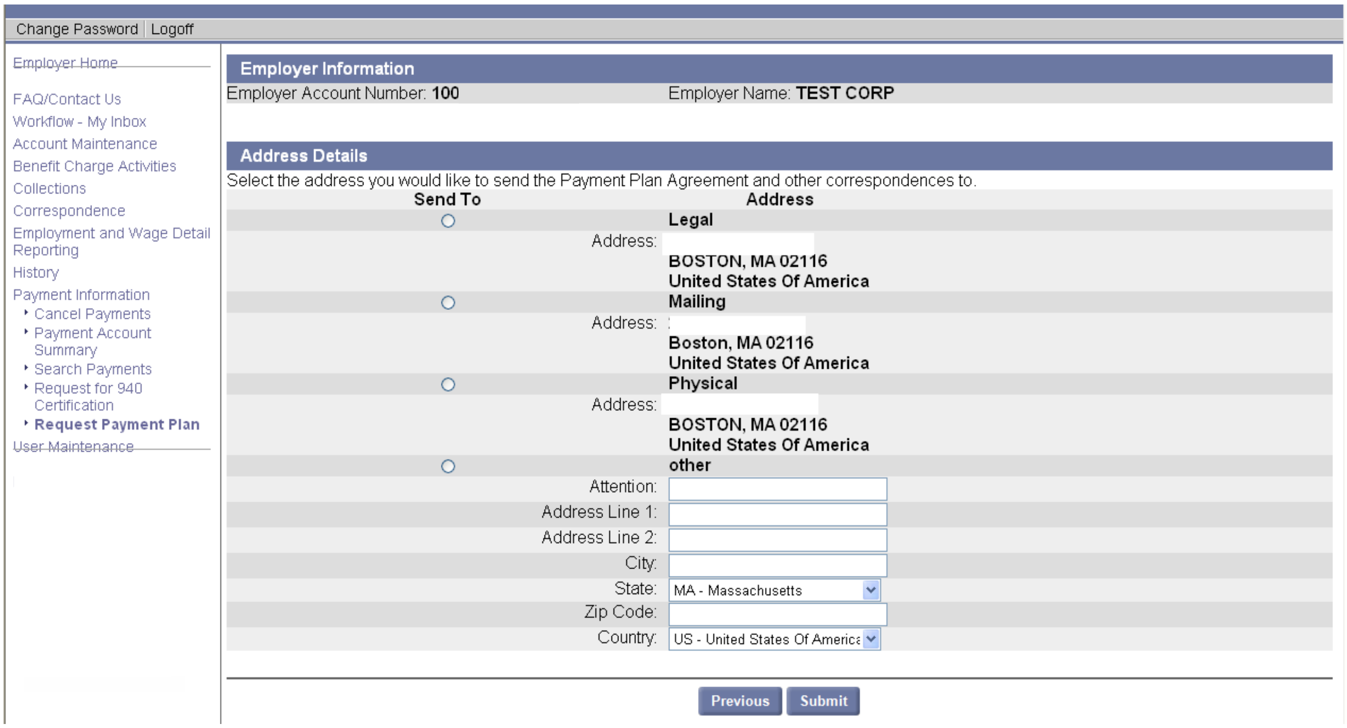


ment plan generated by the system, based on the payment terms entered in the previous step
isplayed. (as shown below)



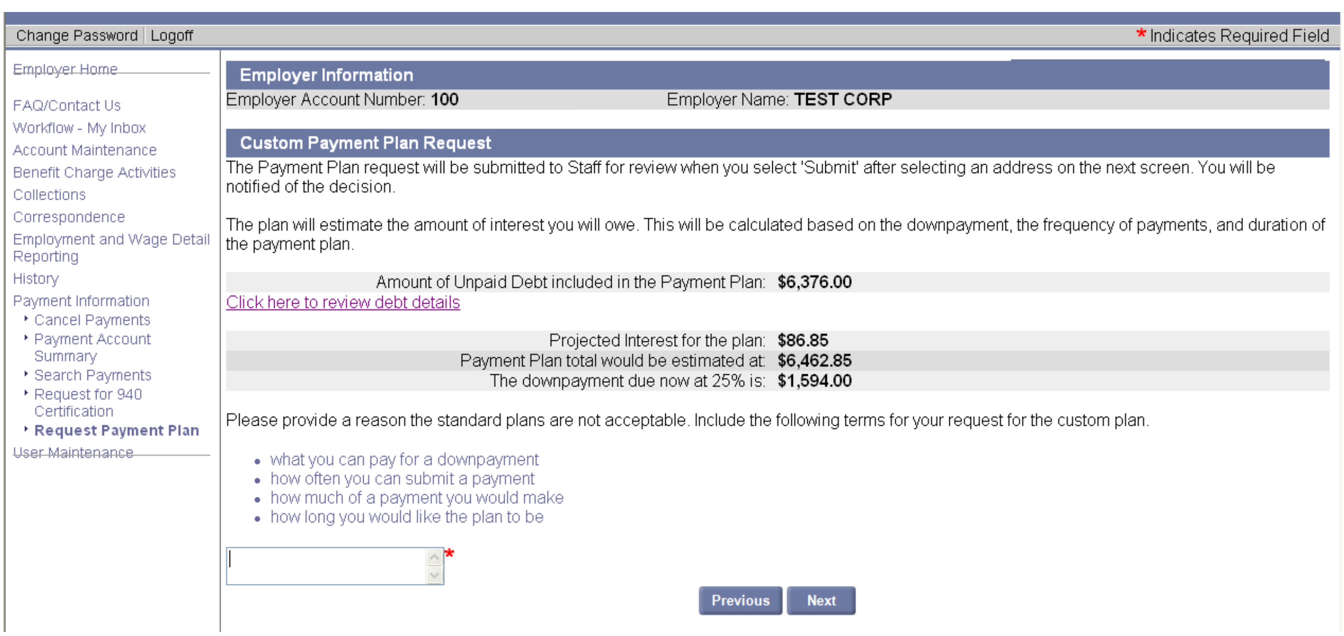
6. Click 'Next' to continue. If you wish to make any adjustments to your p 'Previous'. Alternatively, the system also allows the user to request a cu additional instructions on this option, proceed to step 9.

7. The following screen will appear, displaying the addresses where all correspondences related to the payment plan will be sent.



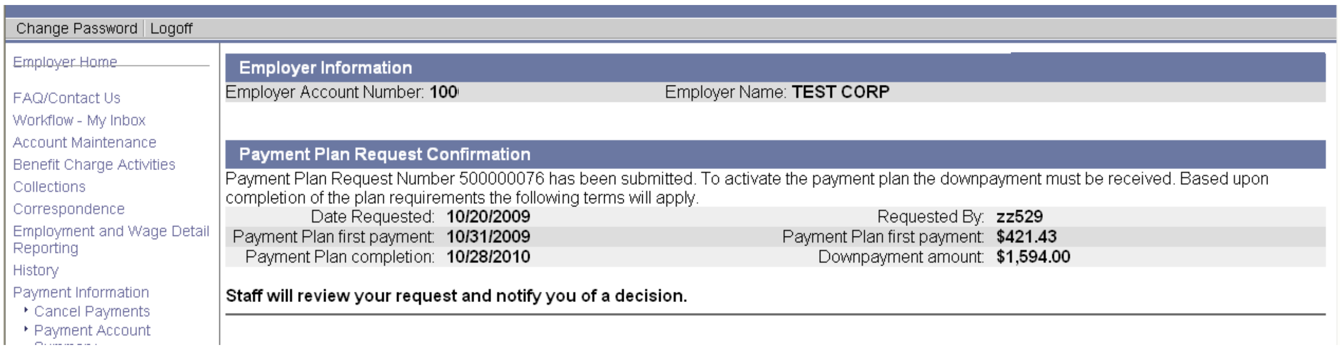
8. Click on 'Submit' to complete the process.

9. If you selected to enter a custom plan in step 6, the following page will appear. Enter your requested payment terms in the box and click 'Next' to continue.



10. The screen shown in step 7 will appear, displaying the address information where all correspondences related to the payment plan will be sent. Click 'Next' to continue.

11. The following confirmation will appear, summarizing your payment plan. The process for requesting a payment plan is complete.

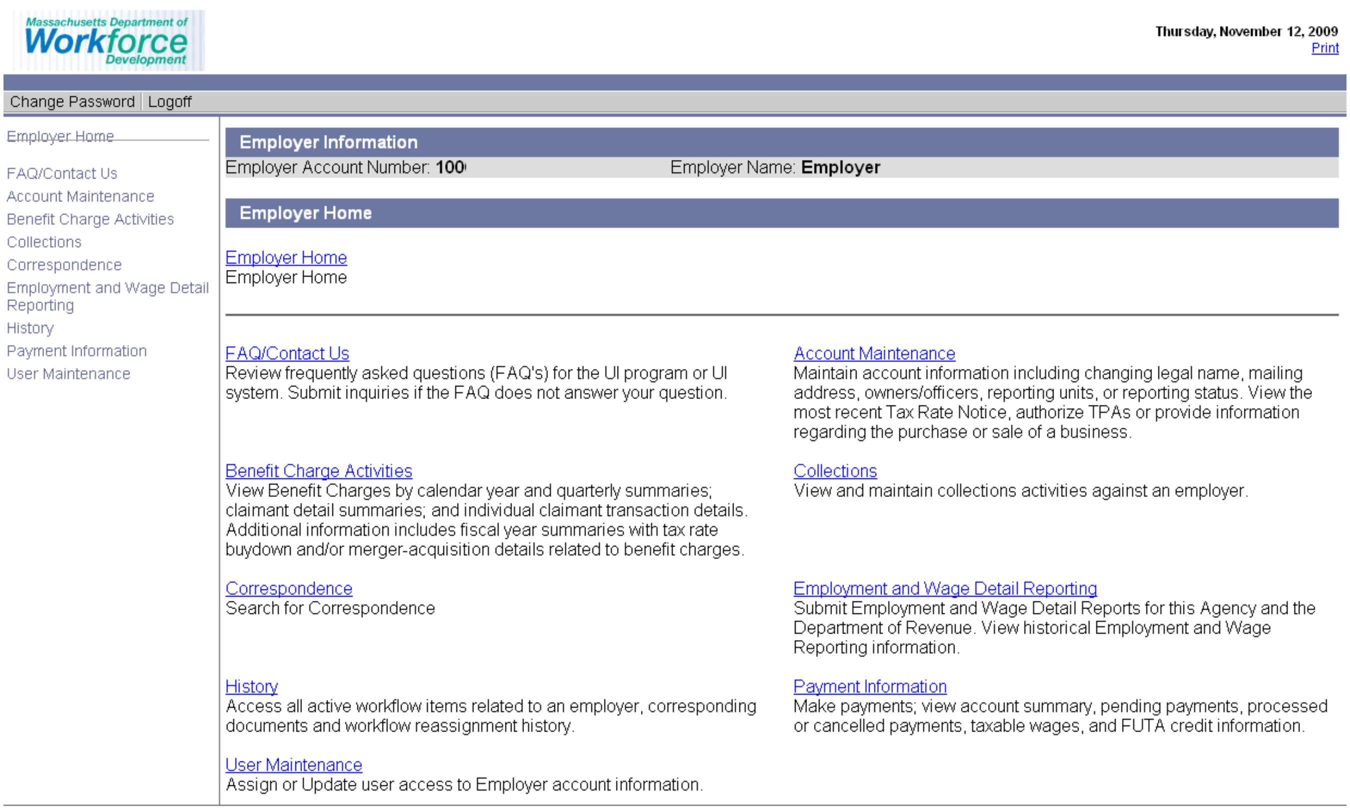


USER MAINTENANCE

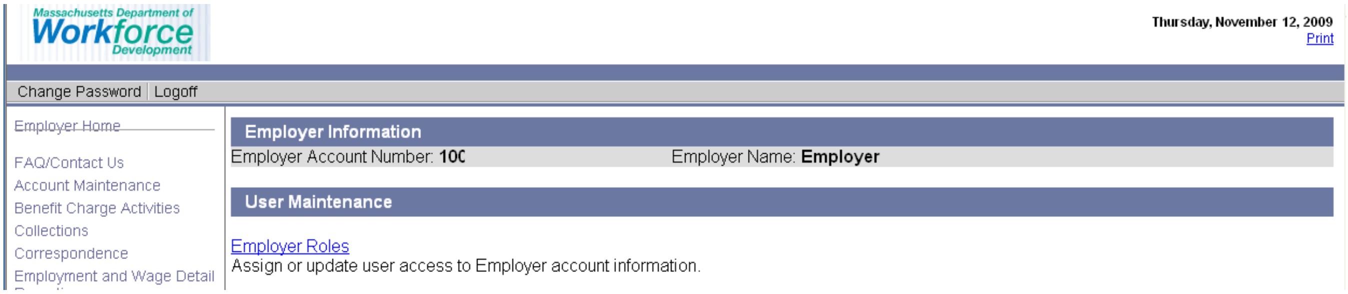
Introduction	This section of the document will show how a system administrator can manage user access on an employer account. The person completing the registration/Account Activation will be the default system administrator and will receive the login credentials to access the QUEST self – service account. The system administrator will be able to create new user accounts and assign roles to each user account. The ability of a user to access available functions is controlled by the roles they have.

Step-by-Step Instructions:

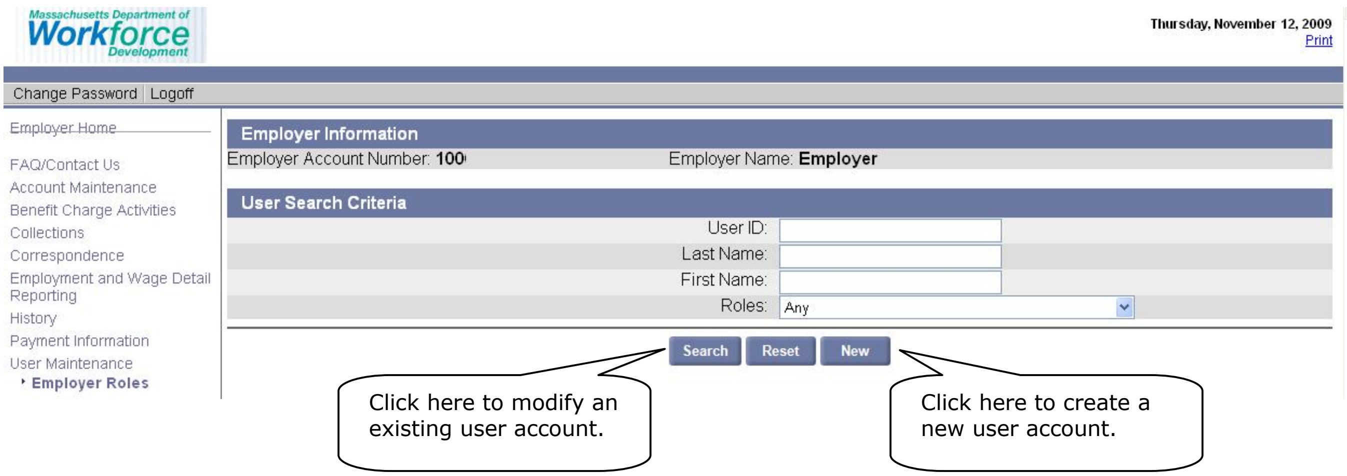
1. Click on the link, 'User Maintenance' while logged into the home page for staff.



2. The following page will appear. Click on the link ' Employer Roles'.

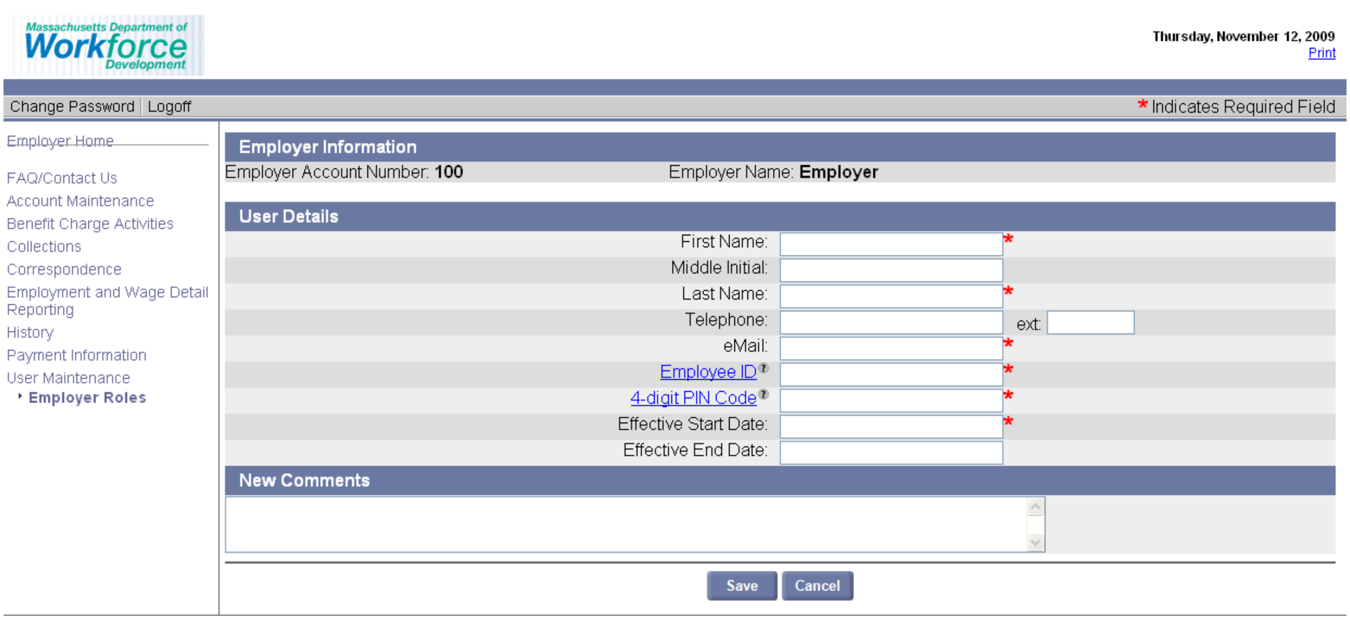


3. The following page will appear.

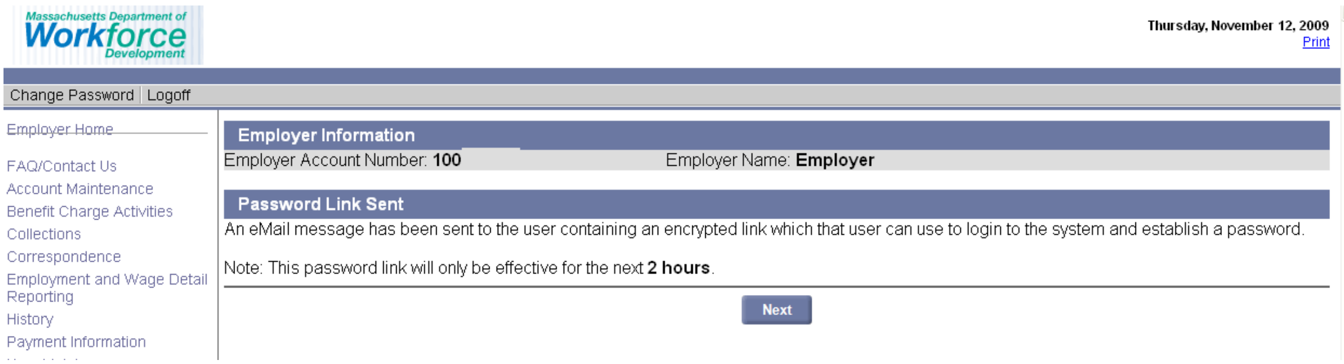


Creating a new user account:

4. The following page will appear. Enter the user details as required. NOTE: The 4 digit PIN you enter here will be used to reset the password for this account. Click 'Save'.



5. The following page will appear, confirming that the login credentials have been emailed to the user.

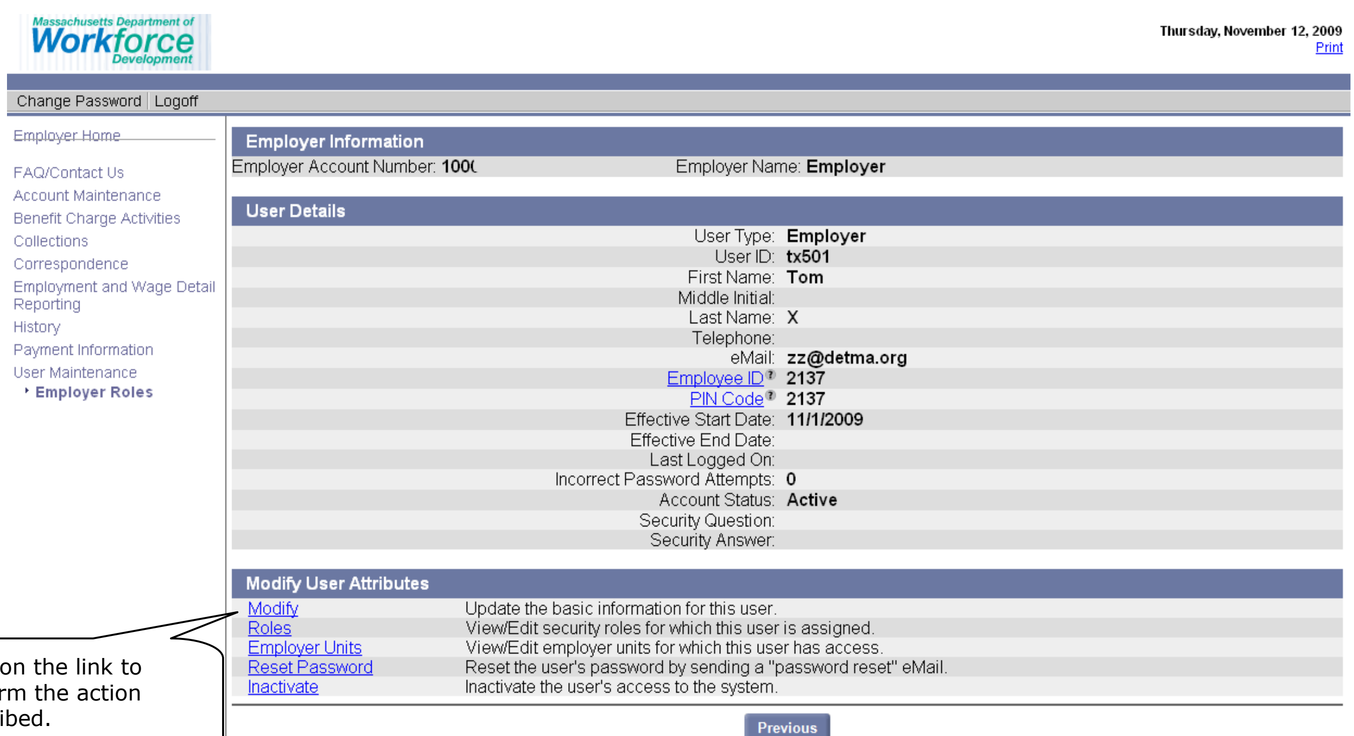


6. The following page will appear, confirming that the login credentials have been emailed to the user.

7. NOTE: You must add roles to the newly created account, in order for the user to be able to use the newly created account. Please refer to the instructions below for adding roles.

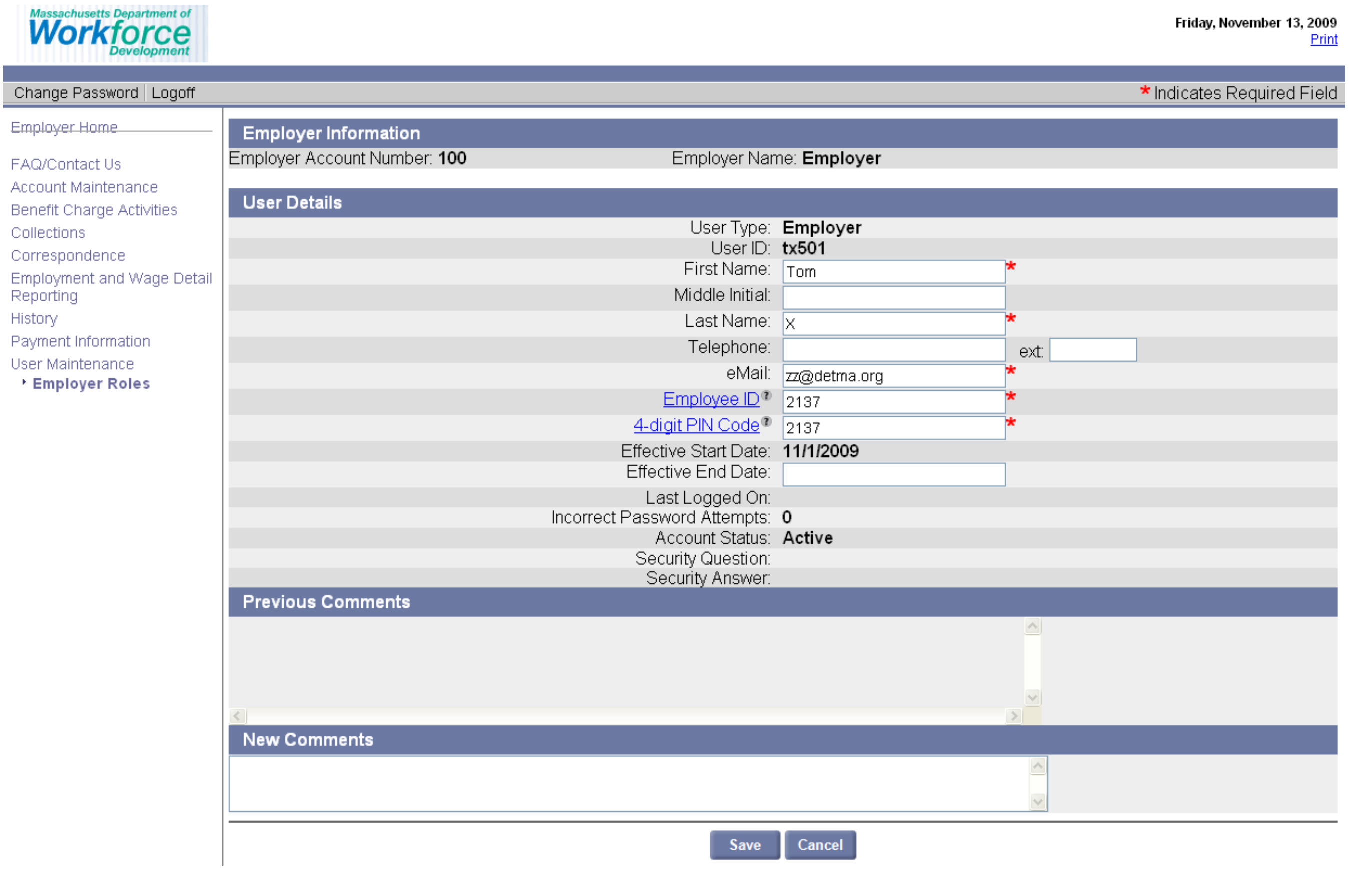
Modifying a User Account:

8. Repeat steps 1 to 3. Enter search criteria to find the account you are looking for and click 'Search'. The search results will appear as shown below.

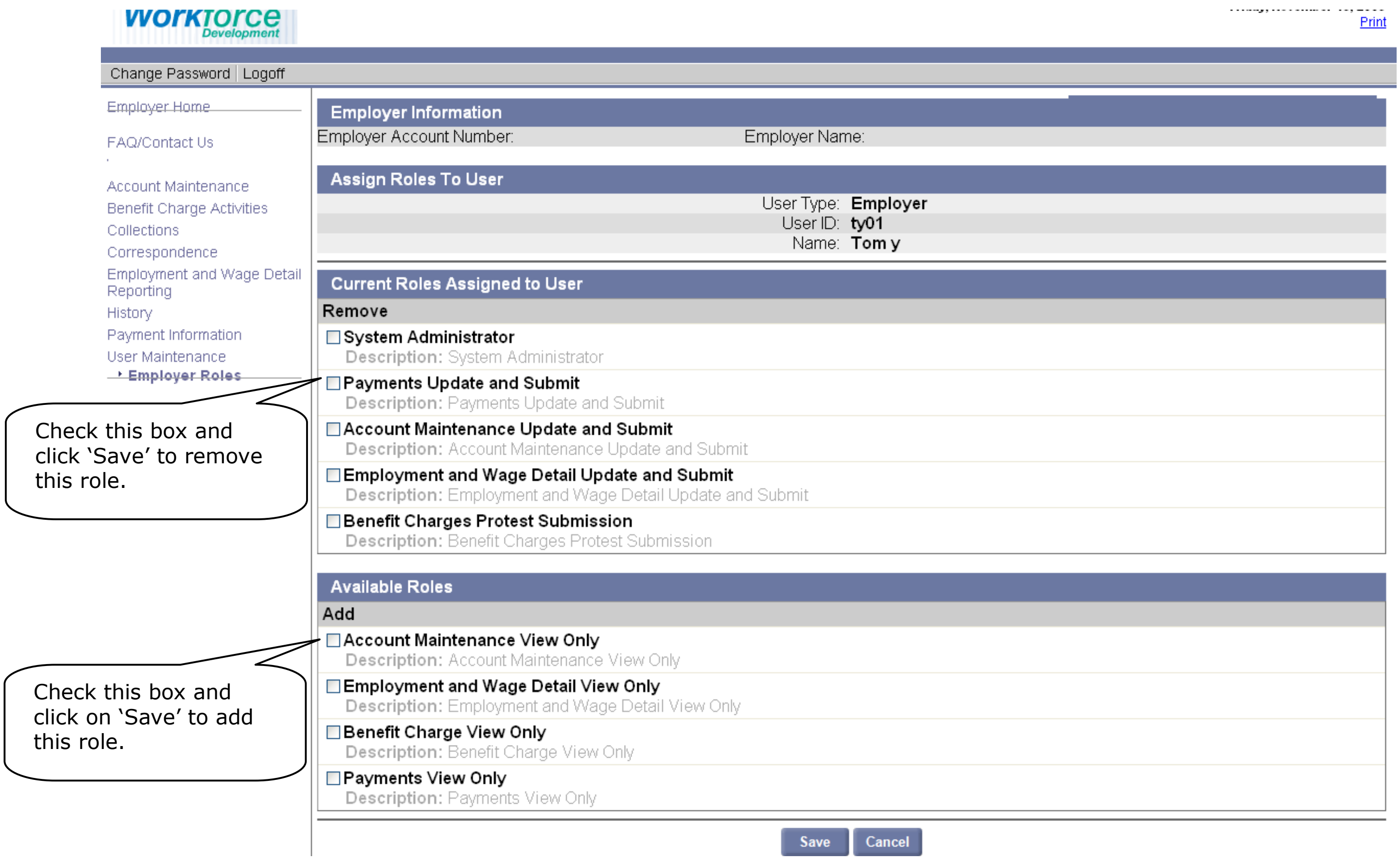


Click on the link to perform the action described.

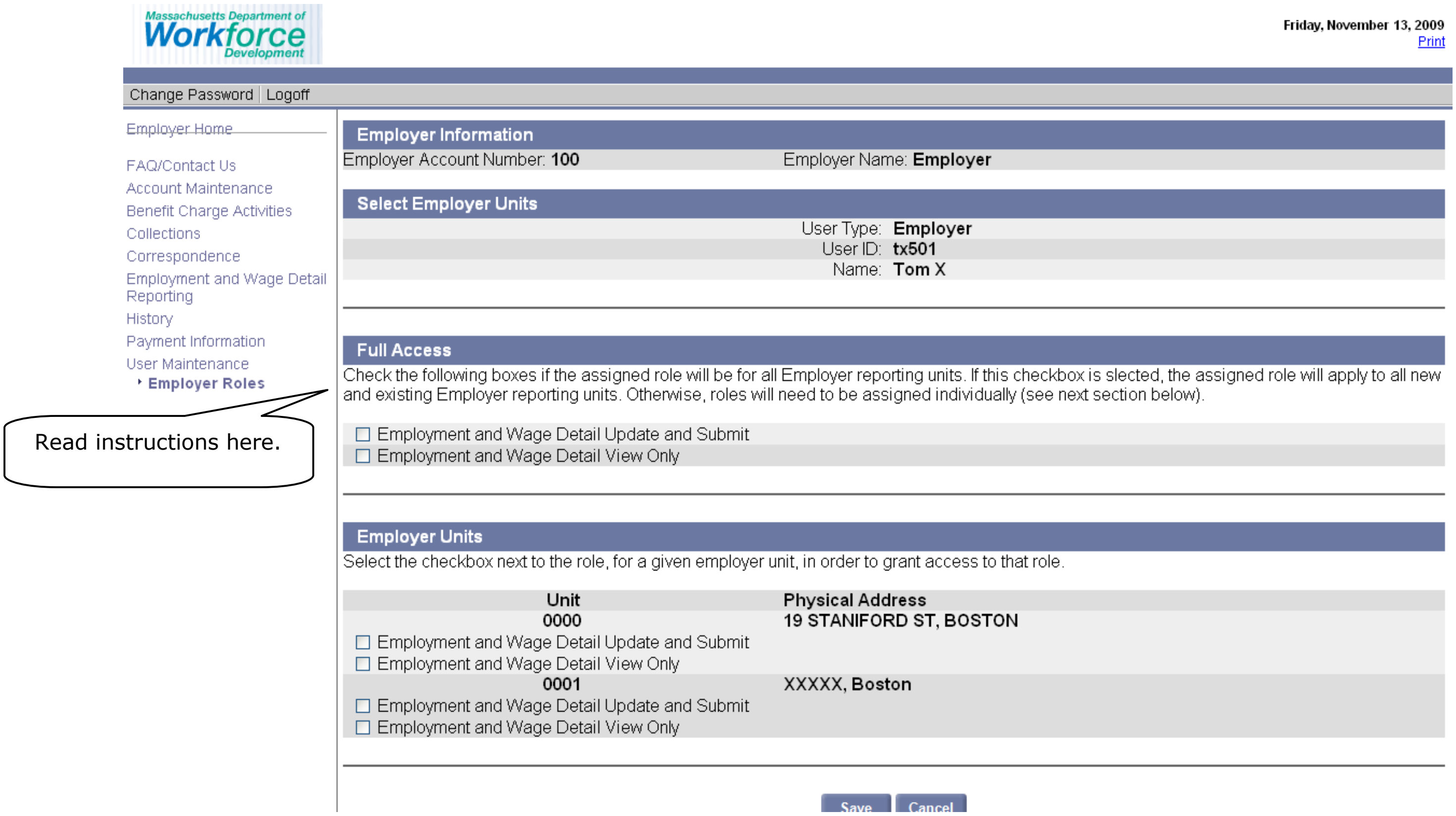
Modify: This link allows you to update the profile of the user. Clicking on the link will open the page shown below. Make your updates and click 'Save'. You will be returned to the page shown in step 8.



Roles: The ability of a user to perform functions within the online QUEST system is controlled by roles assigned to their user account. Example: A user with the role ' Employment and Wage Detail View Only' will have only a view of the employment and wage detail transactions, but will not be able to submit employment and wage detail reports. Clicking on the link 'Roles' will lead to the page shown below. Make your updates and click 'Save'. You will be returned to the page shown in step 8.

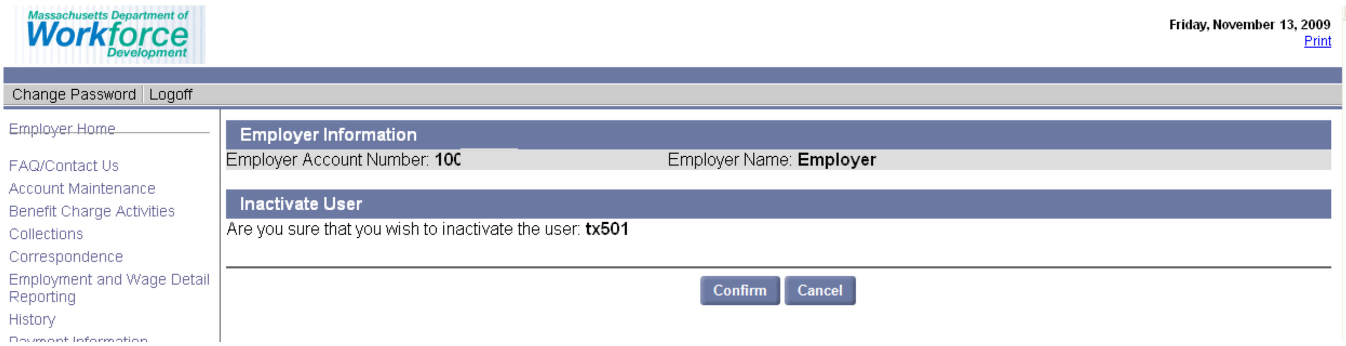


Units: Clicking on the link 'Units' will lead to the page shown below. Here you will be able to control the ability of the user to access Reporting Units with their assigned roles. On this page, enter your updates as necessary and click 'Save'. You will be returned to the page shown in step 8.



Reset Password: You will be able to inactivate a user account, by clicking on the link 'Reset Password'. The following page will appear. Click 'Confirm' to reset the password. The user will receive a link on the email address associated with the account. The user will be able to establish a new password by answering the security questions set up at the time of initial login.

Inactivate: You will be able to inactivate a user account, by clicking on the link 'Inactivate'. The following page will appear. Click 'Confirm' to inactivate the user account.



CORRESPONDENCE

CORRESPONDENCE

Introduction	This section of the document will show how an authorized user can view a correspondence sent from DUA to the employer account on the QUEST system. It will also show how to set up your preference for correspondence method. There are two methods of correspondence available: email and U.S. mail. You will be able to search and view correspondence sent to your account in QUEST, irrespective of your chosen correspondence preference method. If your preference is Email, you will receive a notification to your email address that a correspondence is available for your review. You must login to the QUEST system to view the correspondence. NOTE: You must have Adobe Reader software installed to view the correspondence. This software can be downloaded for free at www.adobe.com

Step-by-Step Instructions:

1. Navigate to the employer home page. The home page will appear as shown below. Click on the link 'Correspondence'.

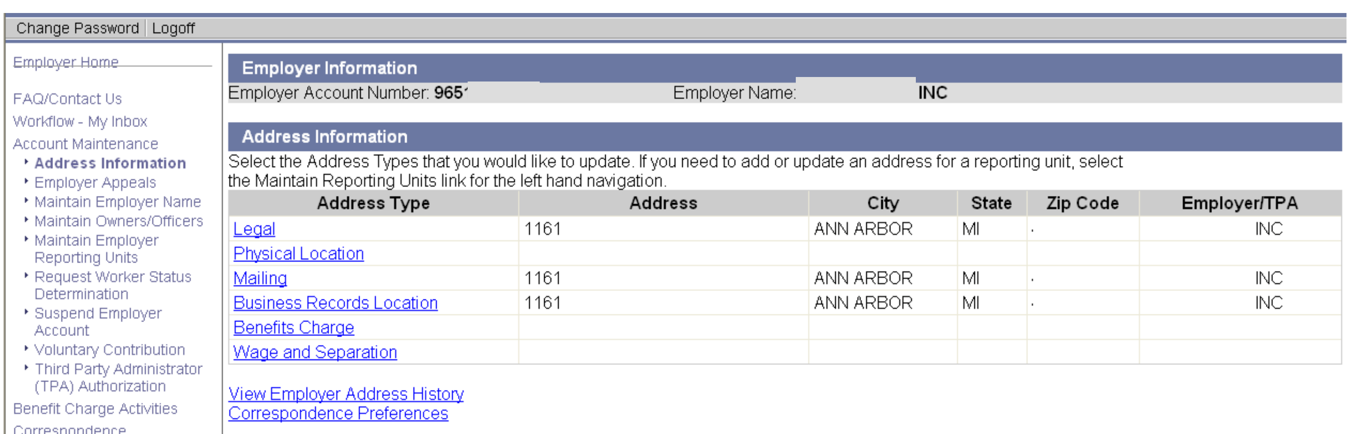
2. The correspondence home page will appear. Click on 'Search'
3. The correspondence search page will appear as shown below. Enter the date range for which you wish to search correspondence for. Click on 'Search'.

4. The search results will appear as shown below. Click on the correspondence number to view a correspondence.

5. The selected correspondence will appear in a new window in pdf format.

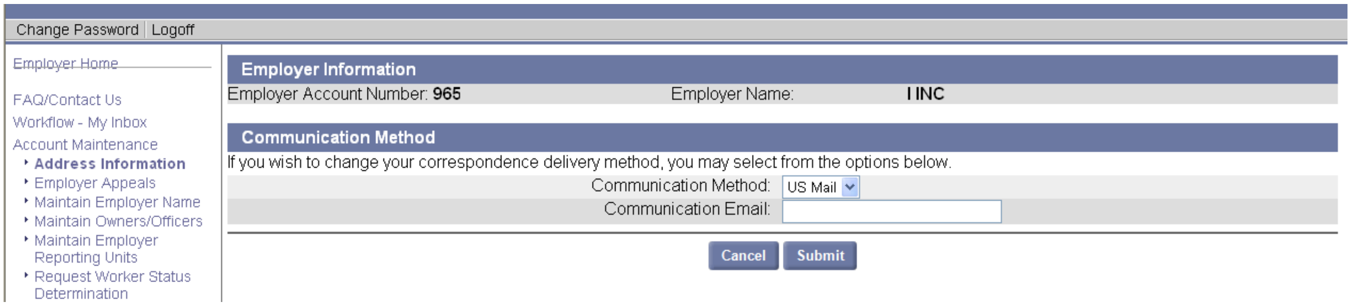
SET UP CORRESPONDENCE PREFERENCE:

1. Navigate to the account maintenance home page. If required please refer to the section, 'Navigating to Account Maintenance'.
2. Click on the link 'Address Information'.
3. The address information page will appear as shown below. Click on the link 'Correspondence Preferences'



Click on the link 'Correspondence Preferences'

4. The following page will appear. On this page, choose your communication method as US Mail or Email. If email is your communication method, enter the email address you wish to receive your correspondence notifications.



5. Click 'Submit' to complete the process.

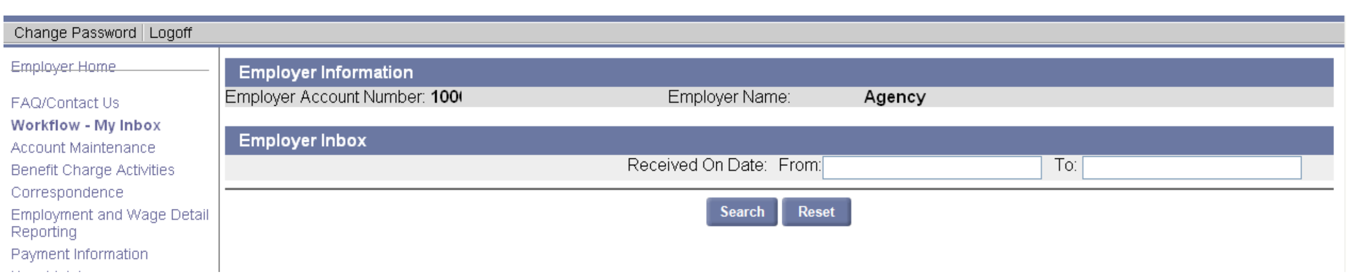
WORKFLOW - MY INBOX

Introduction	'Workflow - My Inbox' allows you to view and respond to Questionnaires sent to you by the DUA. In certain cases, the DUA may choose to send you a questionnaire to seek additional information from you. You will receive a questionnaire in your QUEST inbox, only if your correspondence method is Email. Example: If you have filed an appeal, DUA may need additional information to process your appeal and will send you a questionnaire. This section of the document will show how an authorized user can view and respond to the questionnaires received on QUEST.

Step-by-Step Instructions:

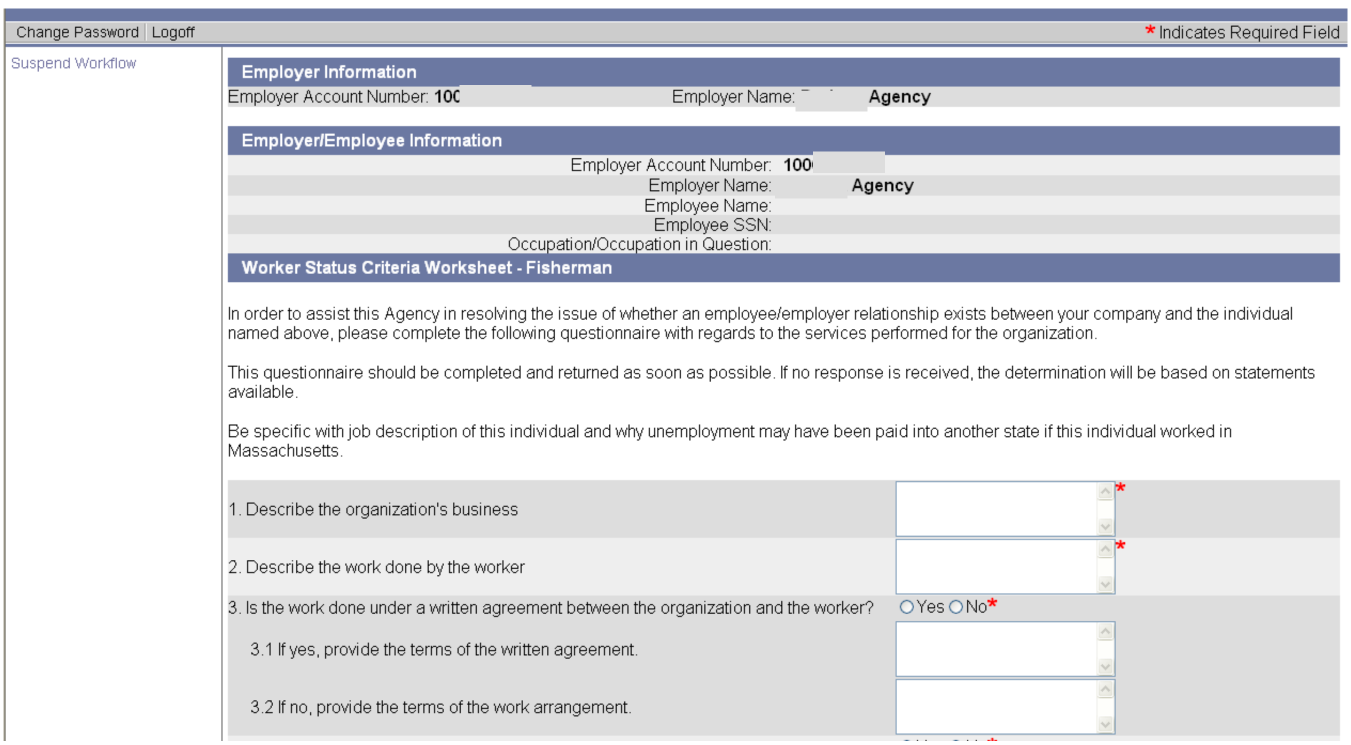
1. Navigate to the employer home page. The following page will appear. Click on the link 'Workflow – My Inbox'

2. The following page will appear. Enter the date range to search for questionnaires received from DUA.



3. The search results will appear as shown below. Click on 'Open', to answer a questionnaire.

4. The questionnaire will appear as shown below. Provide your responses and click on 'Submit' to complete. Your response will be sent to DUA.



ABBREVIATIONS

DUA	Division of Unemployment Assistance
DOR	Department of Revenue
FEIN	Federal Employer Identity Number
LLC	Limited Liability Corporation
MA	Massachusetts
SSN	Social Security Number
TPA	Third Party Administrator
UI	Unemployment Insurance
UHI	Unemployment Health Insurance

ADDENDUM

A. HOURS WORKED GUIDELINE

How do I report hours worked? General Rule:

1. If the employer knows the actual number of hours worked, the employer should report that figure.

2. If the employer does not know the actual number of hours worked, the employer should:

A. for full-time employees use 40 hours per week.

B. for part-time employees, employer should estimate the number of hours.

C. for full-time plus, employer should use 40 hours per week plus an estimate.

Overtime:

The employer should report the number of hours actually worked for which overtime pay or compensatory time is paid without regard for the overtime pay rate. Compensatory time should be reported when taken, not when earned.

Fractions of hours:

If the employee's total number of hours in a quarter results in a fractional amount, the total figure should be rounded to the nearest whole hour. If the fraction is "1/2 hour" or more it should be rounded up to the next whole hour, and if it's less than a 1/2 hour, it should be rounded down.

Vacation/sick/holiday pay:

The actual number of hours for which an employee receives vacation, sick or holiday pay should be reported. Vacations, sick days and Holidays without pay should not be counted as hours worked.

On call:

Hours in which the employee is carrying a pager, or is otherwise "on call" should not be included in the "hours worked" calculation.

Employees not paid by the hour:

These include salaried workers and those paid by commission. Also included are workers who are paid by the mile, by piecework, by the acre, by the payload, by reductions in rent, or other non-hourly rates. When the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at the rate of 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Wages paid less than once per quarter:

This will occur most often with corporate officers who are paid only once or twice a year. The employer should report the number of hours worked in any quarter in which no wages were paid, along with $0 wages. Then, when wages or salaries are finally paid, only the hours worked in that specific quarter should be reported. If the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Faculty members of colleges and universities (includes technical and community colleges):

If the faculty member is considered to be a full-time employee, 40 hours per week paid should be reported. If the faculty member is considered to be part-time, an estimate of the actual hours worked should be made.

School teachers

When teachers or other staff work nine months but are paid over 12 months, their hours should be reported in the quarters that they actually work. For part-time faculty, coaches, etc., if hours are not known, employers may establish an hourly rate of pay and divide that into quarterly gross wages to obtain an estimate of hours.

Volunteer Firefighters:

Employers can establish an hourly rate of pay and divide that amount into the quarterly gross wages to obtain an estimate of hours.

B. EMPLOYMENT AND WAGE DATA SUBMISSION GUIDELINES AND INFORMATION

This is a document available at the DUA QUEST website, providing extensive detail for processing Employment and Wage data through the new QUEST System. This document focuses on process flows, key business rules and changes, and provides employers and agents the contact information necessary to make the necessary preparations for change. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

C. ICESA FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating ICESA Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

D. EFW2 FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating EFW2 Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

E. DELIMITED FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating Delimited Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this Employer User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.